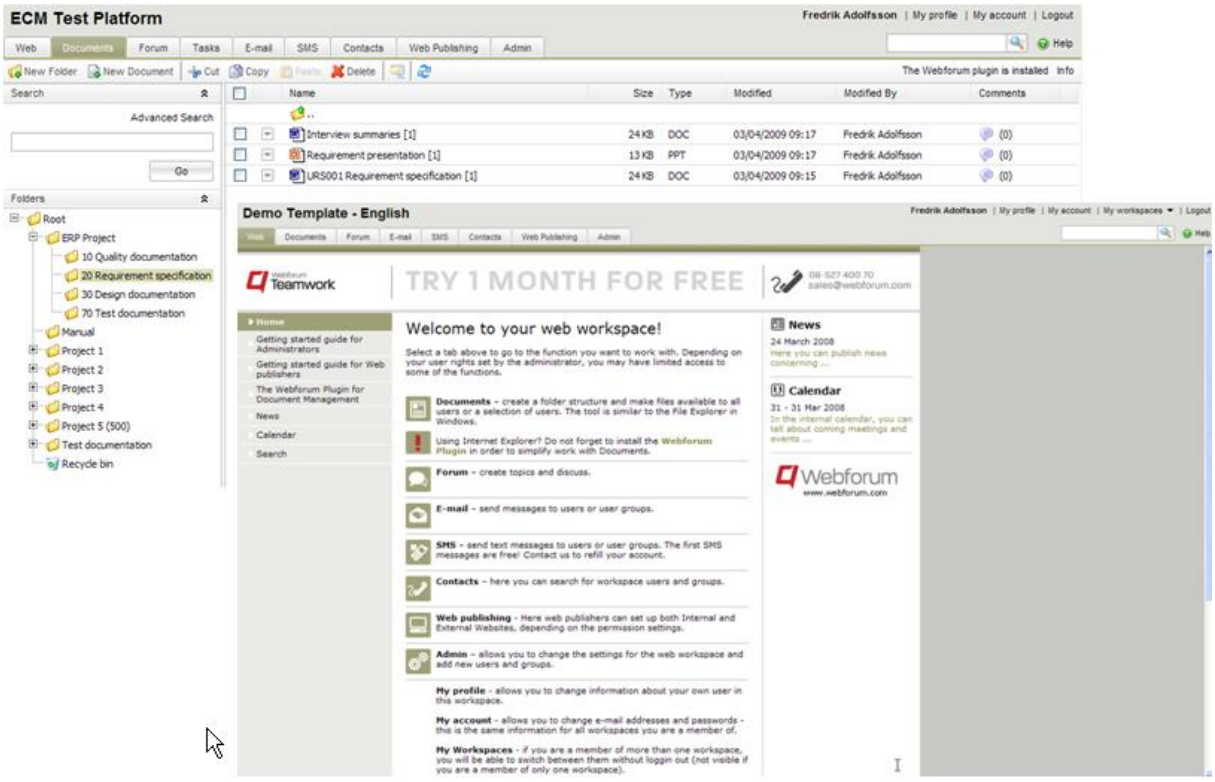
Webforum Teamwork & Professional

User and Administrator Manual


ECM Test Platform
Fredrik Adolfsson | My profile | My account | Logout
Web
Documents
Forum
Tasks
E-mail
SMS
Contacts
Web Publishing
Admin
Help
New Folder
New Document
Cut
Copy
Paste
Delete
The Webforum plugin is installed
Info
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Go
Folders
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20 Requirement specification
30 Design documentation
70 Test documentation
Manual
Project 1
Project 2
Project 3
Project 4
Project 5 (500)
Test documentation
Recycle bin
Name
Size
Type
Modified
Modified By
Comments
Interview summaries [1]
24 KB
DOC
03/04/2009 09:17
Fredrik Adolfsson
(0)
Requirement presentation [1]
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PPT
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Fredrik Adolfsson
(0)
URS001 Requirement specification [1]
24 KB
DOC
03/04/2009 09:15
Fredrik Adolfsson
(0)
Demo Template - English
Fredrik Adolfsson | My profile | My account | My workspaces | Logout
Teamwork
TRY 1 MONTH FOR FREE
08-527 400 70
sales@webforum.com
Home
Getting started guide for Administrators
Getting started guide for Web publishers
The Webforum Plugin for Document Management
News
Calendar
Search
Welcome to your web workspace!
Select a tab above to go to the function you want to work with. Depending on your user rights set by the administrator, you may have limited access to some of the functions.
Documents - create a folder structure and make files available to all users or a selection of users. The tool is similar to the File Explorer in Windows.
Using Internet Explorer? Do not forget to install the Webforum Plugin in order to simplify work with Documents.
Forum - create topics and discuss.
E-mail - send messages to users or user groups.
SMS - send text messages to users or user groups. The first SMS messages are free! Contact us to refill your account.
Contacts - here you can search for workspace users and groups.
Web publishing - Here web publishers can set up both Internal and External Websites, depending on the permission settings.
Admin - allows you to change the settings for the web workspace and add new users and groups.
My profile - allows you to change information about your own user in this workspace.
My account - allows you to change e-mail addresses and passwords - this is the same information for all workspaces you are a member of.
My Workspaces - if you are a member of more than one workspace, you will be able to switch between them without loggin out (not visible if you are a member of only one workspace).
News
24 March 2008
Here you can publish news concerning ...
Calendar
31 - 31 Mar 2008
In the internal calendar, you can tell about coming meetings and events ...
Webforum
www.webforum.com

Last update: 2015-09-09

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Introduction

Webforum Teamwork is an Internet-based work and communication workspace, specially conceived to assist people within companies, organisations and project teams to cooperate and/or to disseminate information.

This manual also contains certain parts that are specific for Webforum Professional. These are marked "(Professional)". Those parts of Webforum Professional that are related to Webforum Project are not covered here.

The workspace is made available by Webforum Europe AB (webforum.com) as a SaaS solution and includes all required software and hardware as well as server space and Internet connection for efficient operation. In addition, Webforum is responsible for maintenance, back-up and other services. The Platform is made available to Platform Operators on a license basis. The Terms and Conditions for Using the Platform are outlined in the **User and Operator Agreements.** Please make sure to have read and understood the terms and conditions stated in these Agreements.

Each Workspace has one or several Administrators, which are appointed by the Platform Operator. The Administrator is responsible for setting up the Workspace, for inviting users to the Platform and for assigning limitations for users to access the Workspace. A detailed description of the administration of the Workspace is given in the Administration section of this manual.

Logging in

The Workspace can be accessed using standard web browsers such as Microsoft Internet Explorer or Firefox. In order to use all the Platform functions, Version 10 or higher of Microsoft Internet Explorer or the latest Firefox version are recommended. Login information, which is provided by the Platform Administrator in an Invitation e-mail, is personal and may not be passed on to others. Make sure to store this information in a secure location.

The first time you log in, you can use the link provided in the invitation e-mail, other times you type the web address (URL) of the Workspace.

Enter your ***Username*** and ***Password*** and select your desired language. Finally press *Login.*

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Webforum login window

By activating the checkbox 'Remember me', your Username and Password are saved for your next login. You should only use this option when working on your own and secure computer. Otherwise, others may be able to view and misuse the login information. Be careful when using an unknown computer, it may have settings that can trace login information. If you have any doubts – check before entering the login information. An administrator can prevent users from using this function on specific workspaces.

Lost or forgot your personal Username and Password?

If you have forgotten your personal Username and Password, click 'Forgot password?'. You will receive an automatic e-mail message with a one-time temporary password that you will be asked to change when logging in.

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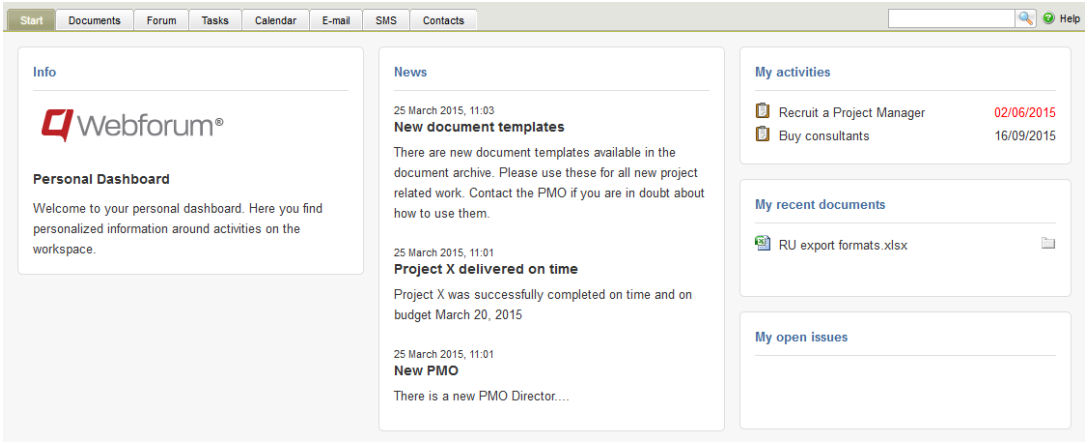
Layout of the Workspace

The workspace has a standardised layout consisting of the following fields:

- Header at the top with workspace name and user information
- Navigation tabs
- Main frame in the centre



The Workspace start page

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Header

Header

The title of the Workspace name is shown in the upper left corner of the header. To the right, the name of the user logged in is displayed. Clicking the user name, the user can access the personal pages "My profile" and "My account", and options to switch to another language or to logout. In order to prevent other persons from accessing the Workspace without logging in, you should click *Logout* in the Header area whenever you wish to leave the Platform. A separate menu "My workspaces" lets the user switch workspaces (provided that the user is a user on more than one workspace).

You will be logged off automatically after 120 minutes of inactivity. A warning message will appear 5 minutes before being logged off.

A picture of the logged in user is displayed in the top left corner. Click on the picture to replace it. The same picture is displayed on all your workspaces.

In the bottom right corner of the Header, there is a Workspace search tool.

My profile

My profile is your contact information, which is specific for the Workspace area. If you are a member of several Workspaces, this information can differ between Workspaces.

My profile is described in further detail later in this manual.

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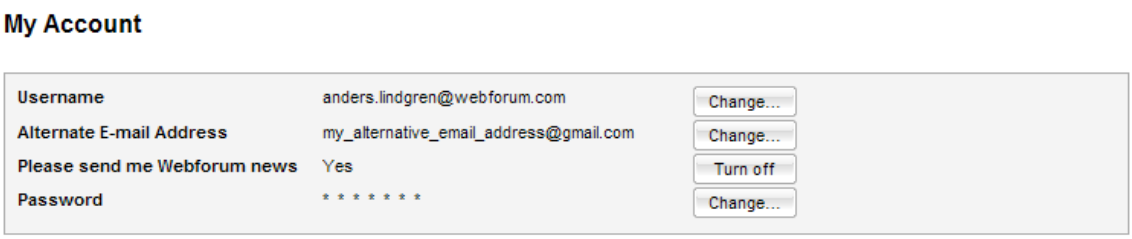
My Account

In "My account", the user can access the Webforum User Account information. Each user can only have one User Account and if the user is a member of more than one Workspace, this account information is the same for all Workspaces. In this section, the user can:

- **Change Username**
  Use this function if you need to change username (email address).
- **Change Alternative E-mail Address**
  If a user has lost access to the primary e-mail address, this email address can be used to reset password using the *Lost your password?* functionality on login page.
- **Webforum news**
  By turning on or off this option you can decide if information like product news and updates from Webforum should be sent to your email address or not.
- **Change password**



My Account.

For security reasons, most changes in My account must be confirmed by entering your password.

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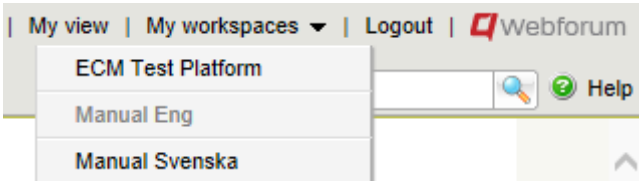
My workspaces

"My workspaces" is a feature available to users that are members of more than one Workspace. It is a Single-Sign-On feature that makes it possible for users to switch between Workspaces without having to go through a logout and login procedure.

To switch Workspace, simply click on the dropdown menu to see all available Workspaces, and select the desired one to switch to.



Click on My workspaces to switch between your workspaces.

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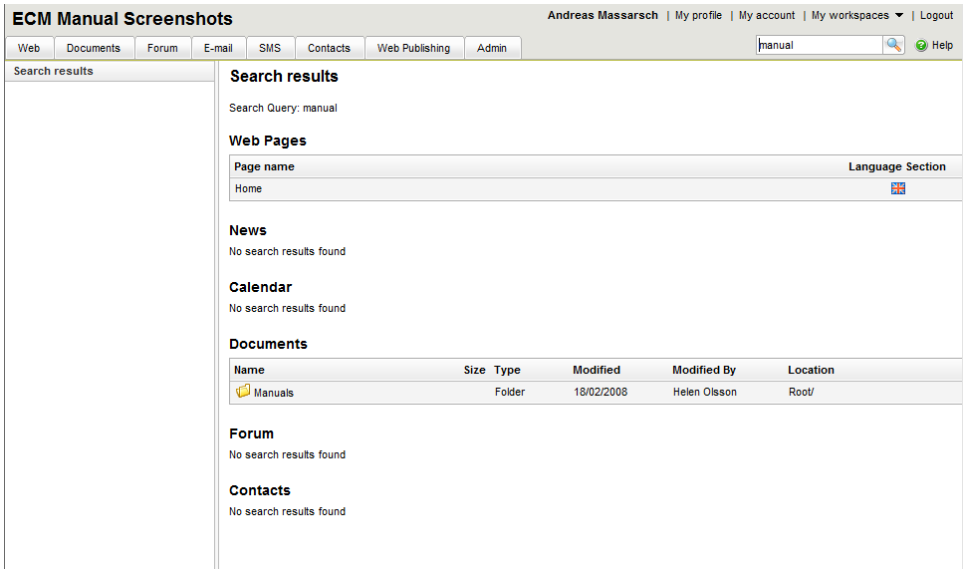
Workspace search

The Workspace search allows the user to perform a search that includes all sections of the Workspace. The search results are presented per module. You can go directly to an item by clicking on it. Clicking on a document will open it. Clicking on a link to the document's location will take you to the folder in the document archive containing the document.



Workspace search result presentation.

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Navigation tabs

The navigation tabs allow the user to switch between the different modules of Webforum Teamwork. Which tabs that are available depend on the user's permissions.

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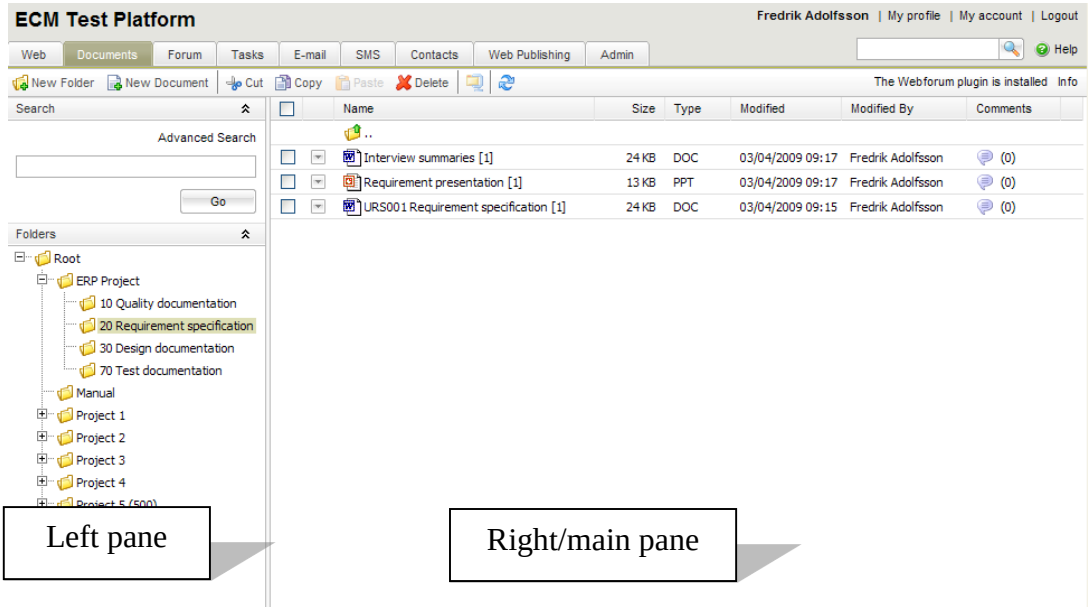
Main area

The main area is where the modules are displayed. The content depends on which module is selected.



Example of the Document archive, with the search toolbox and folder navigation in the left pane, and contents shown in the right pane.

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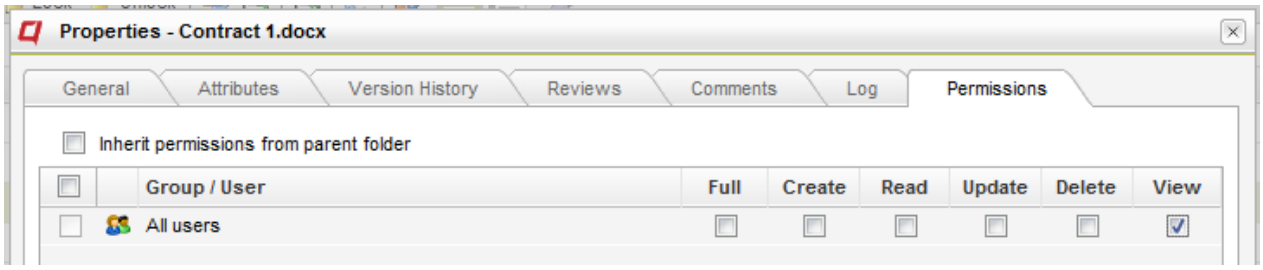
Permission system

Introduction

Webforum Teamwork has a very flexible permission system allowing administrators to give users and user groups access to objects such as web pages on the protected website, Document Folders or Documents and specific forums in the Discussion Forum. How to add users and groups is explained in the Administration section.

The permission system works the same way in all modules. By clicking on "Permissions" for an object, a dialogue box will open. The principle of the permission settings for a group or user is:

Full: the user has full access to the object and can create, read update and delete the object.
Create: the user has permission to create within the object, such as upload a new document in a folder.
Read: the user has permission to see and read the object, for example open a document.
Update: the user can update the object, for example update a web page
Delete: the user has permission to delete the object
View: the user can see a document, but not save or print it (document and folder objects only).



Permissions for documents

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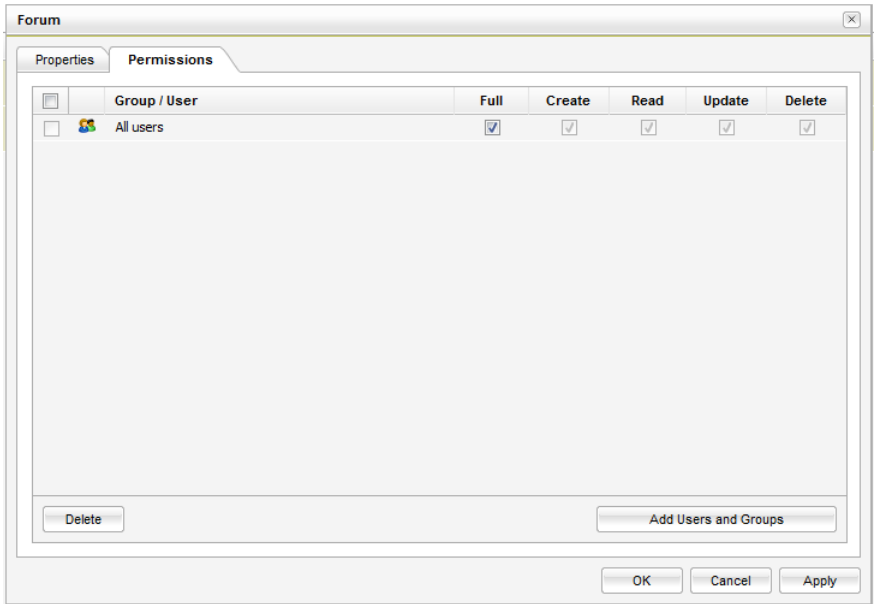
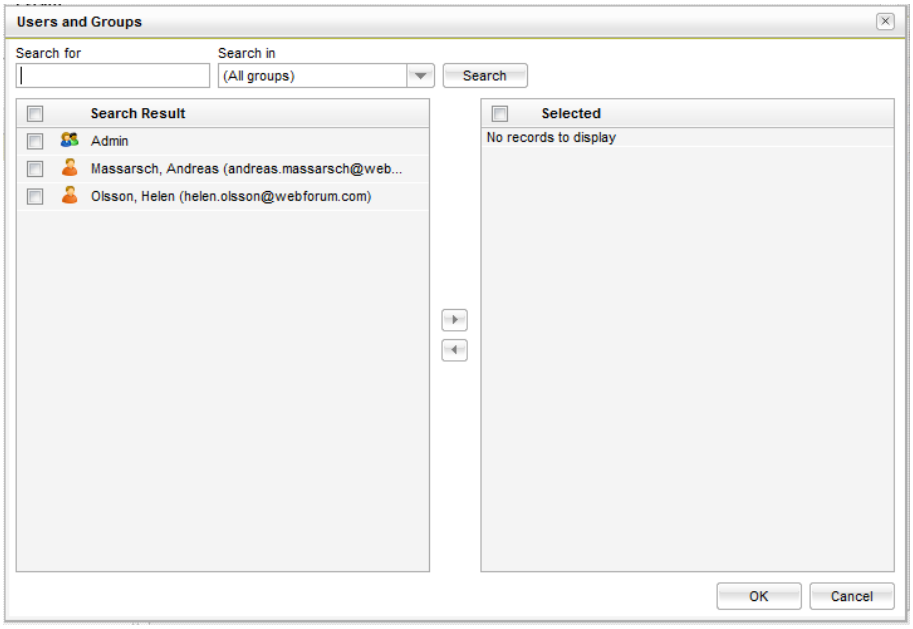


Example of permission settings for a forum in the Discussion Forum.

There is built-in logic, so that if a user has permission to create, update or delete, he automatically receives read permission.

By default, a user group called *"All Users"* is included, which means that all users in the Workspace area have at least the permissions set for this user group.

To set up new permissions for a user group or a set of individual users, click on *"Add Users and Groups"*. A new dialogue box will open where groups and users can be searched and selected. To select users or groups, mark the checkboxes and click on the arrow to move them to the right box. Finish by clicking "OK".



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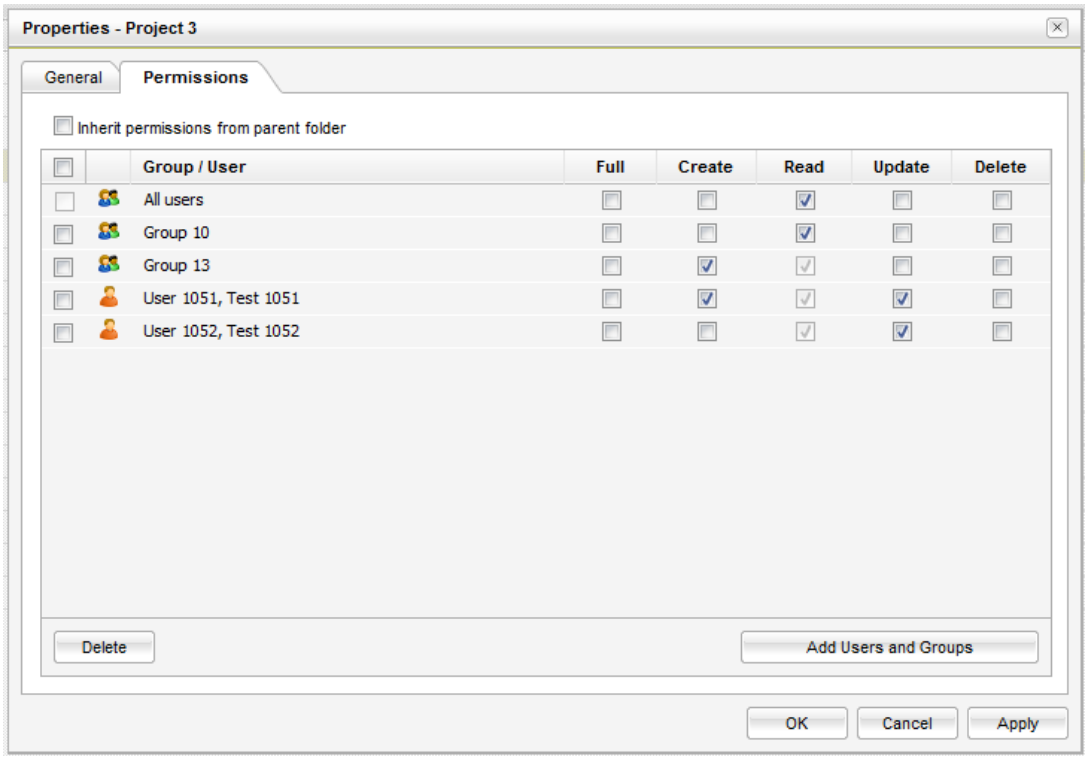
Inherit permissions

Some modules, such as the Protected website and the Document archive, can have a multilevel structure, for example folders within folders. In such cases, permissions set for the parent folder are by default inherited by the subfolders. To change this, uncheck the *"Inherit permissions from parent folder"* checkbox, and set your desired permissions.



Example of permission settings, where the "Inherit permissions" has been unchecked.

Module specific details

See appendix 2 for permission details regarding modules:

- Documents
- Forum
- Website Administration

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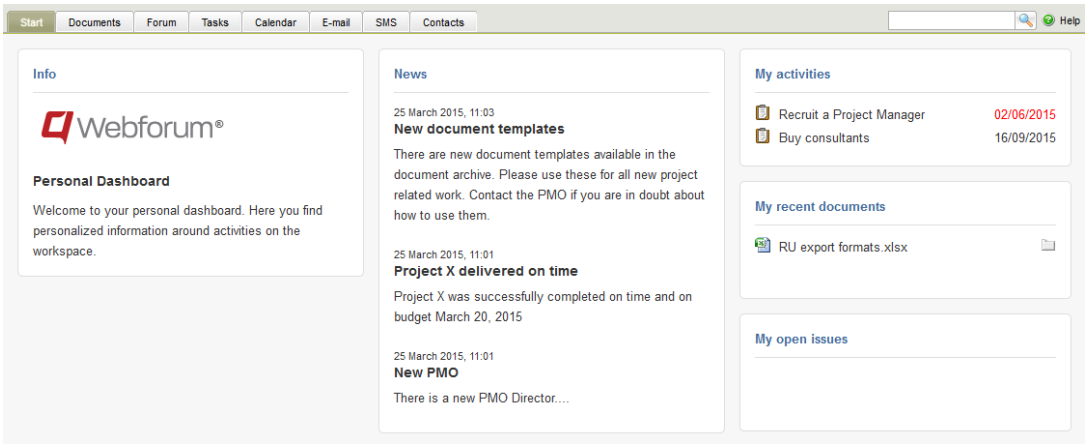
Start Page

The start page is the first page that a user sees when they login to Webforum. (This module has not been turned on for most existing workspaces. Contact Webforum or your Webforum reseller to have it turned on.) The start page has widgets for information from the workspace administrators and widgets that display information relevant to the user such as tasks assigned to the user or the user's recently opened documents. Administrators can decide which widgets are displayed on the workspace.


Start
Documents
Forum
Tasks
Calendar
E-mail
SMS
Contacts
Help
Info
Webforum®
Personal Dashboard
Welcome to your personal dashboard. Here you find personalized information around activities on the workspace.
News
25 March 2015, 11:03
New document templates
There are new document templates available in the document archive. Please use these for all new project related work. Contact the PMO if you are in doubt about how to use them.
25 March 2015, 11:01
Project X delivered on time
Project X was successfully completed on time and on budget March 20, 2015
25 March 2015, 11:01
New PMO
There is a new PMO Director....
My activities
Recruit a Project Manager 02/06/2015
Buy consultants 16/09/2015
My recent documents
RU export formats.xlsx
My open issues

The start page

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Web / Protected Website

The functionality and administration of the protected website is covered in the **Webforum Content Publisher** manual, available at webforum.com. The protected website is not a standard module included for all customers.

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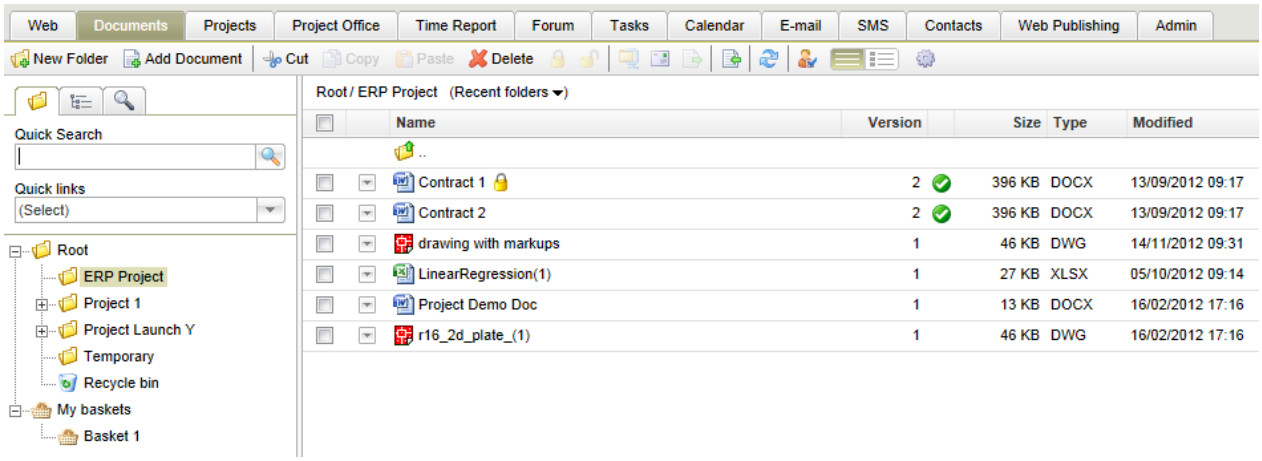
Documents

Introduction

The Documents section contains shared files (e.g. text documents, images etc.), which are stored in folders in the workspace.

When opening the Document archive, a Toolbar and two panes are shown. In the left pane, there are navigation options and a folder tree structure. The right pane displays the content of the selected folder. By default, the archive shows the root folder content.

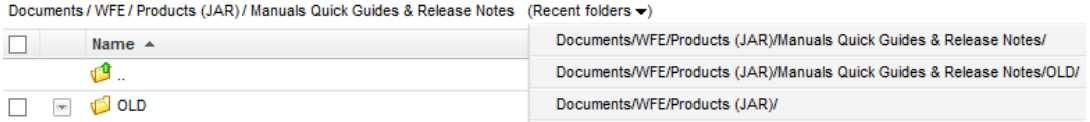


Overview of the Document Archive – the Toolbar at the top, the left pane containing navigation options and the folders. The contents of the selected folder shown in the right pane.

Empty folders have a specific "empty folder" icon . A folder is considered empty if the folder and all subfolders are empty.

By default, the folder view is opened, but it is also possible to click on the tabs for Navigation trees (Professional only) and advanced search. These tabs are explained in more detail later on.

"Recent folders" is a drop down list that allows you to quickly navigate to folders you recently visited.


Documents / WFE / Products (JAR) / Manuals Quick Guides & Release Notes (Recent folders)
Name
OLD
Documents/WFE/Products (JAR)/Manuals Quick Guides & Release Notes/
Documents/WFE/Products (JAR)/Manuals Quick Guides & Release Notes/OLD/
Documents/WFE/Products (JAR)/

Recent folders

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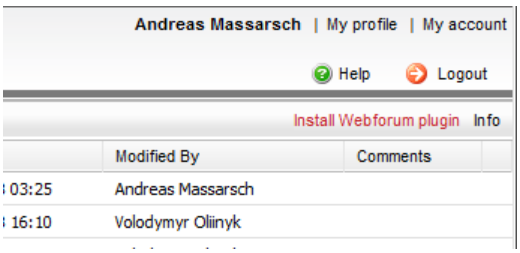
Webforum plugin for Internet Explorer

Webforum has developed a plugin for Internet Explorer which gives the user enhanced features in the Document archive. It lets the user:

- Drag and drop files and folders from the file system of your computer to the document archive
- Open documents so that they can be saved directly to the document archive



Installation of the Webforum plugin for IE

In this manual, we assume that the plugin has been installed. At the end of this chapter, information is given about working in the Document archive without the Plugin.

Instructions on how to install the plugin are given in Appendix 1.

Webforum extension for Firefox

Webforum has developed an extension for Firefox that lets the user drag and drop files from the computer to the document archive. The extension works with the latest Firefox version on Windows and Mac OS. Edit online is possible for MS office files. A link for installing the Firefox extension is available in the top right corner of the document archive.

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Overview of Toolbar

The Toolbar of the Document archive contains a number of icons used to perform different actions. Which icons are enabled depends on the task to be performed and permission settings. If an option is not available, the icon will turn grey. Below is a brief presentation of the tools.

	Create a new folder
	Upload new documents (one or many)
	Cut selected files or folders
	Copy selected files or folders
	Paste selected files or folders
	Delete selected files or folders
	Lock/Unlock documents
	Attribute mass update (professional only)
	Lend/Return documents (professional only)
	Zip and download selected files or folders
	E-mail (including selected documents as links or attachments)
	Export files and a list of metadata Import files and metadata Refresh the document archive
	Show user permissions
	Toggle between list view or thumbnail view
	Configuration of document attributes and document types (professional only)

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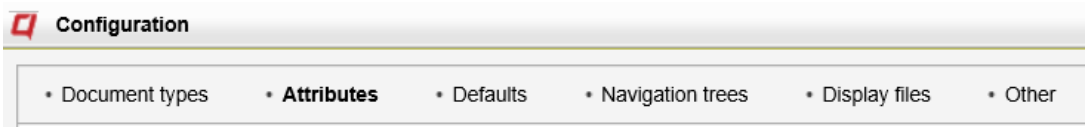
Document Configuration (Professional)

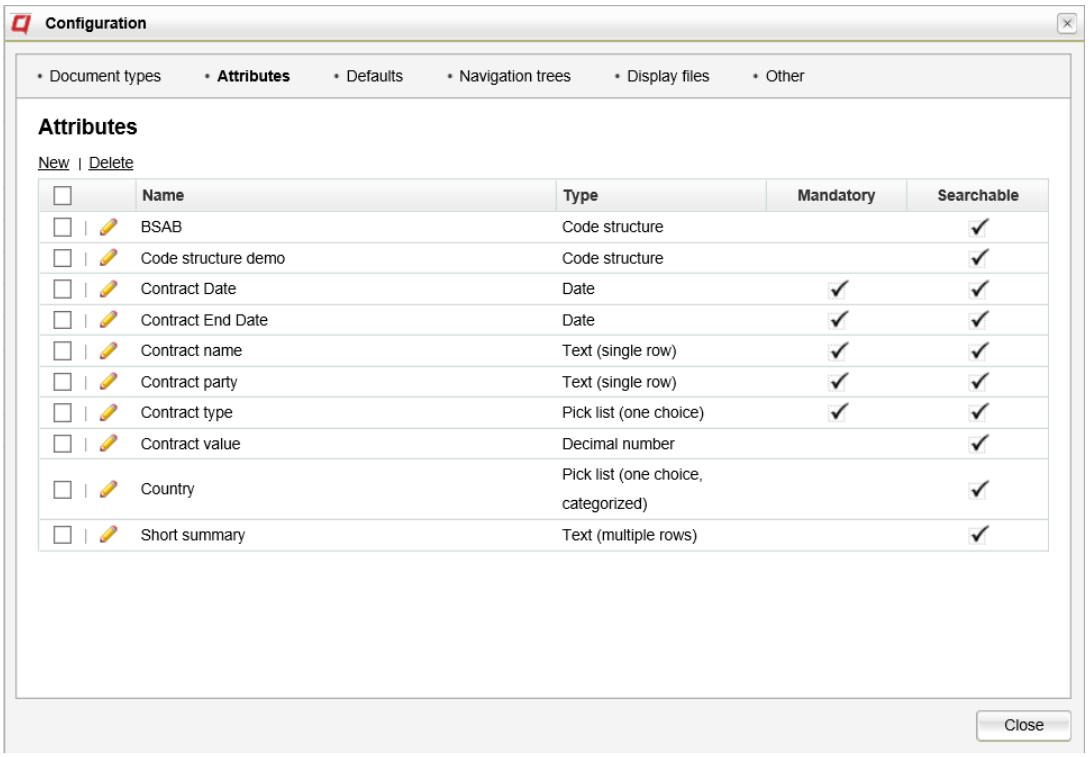
Clicking on the configuration icon in the toolbar takes you to the configuration window:



Document configuration.

Attributes

Here you can set up attributes (metadata). Attributes may be used by more than one document type.



Attribute configuration dialog

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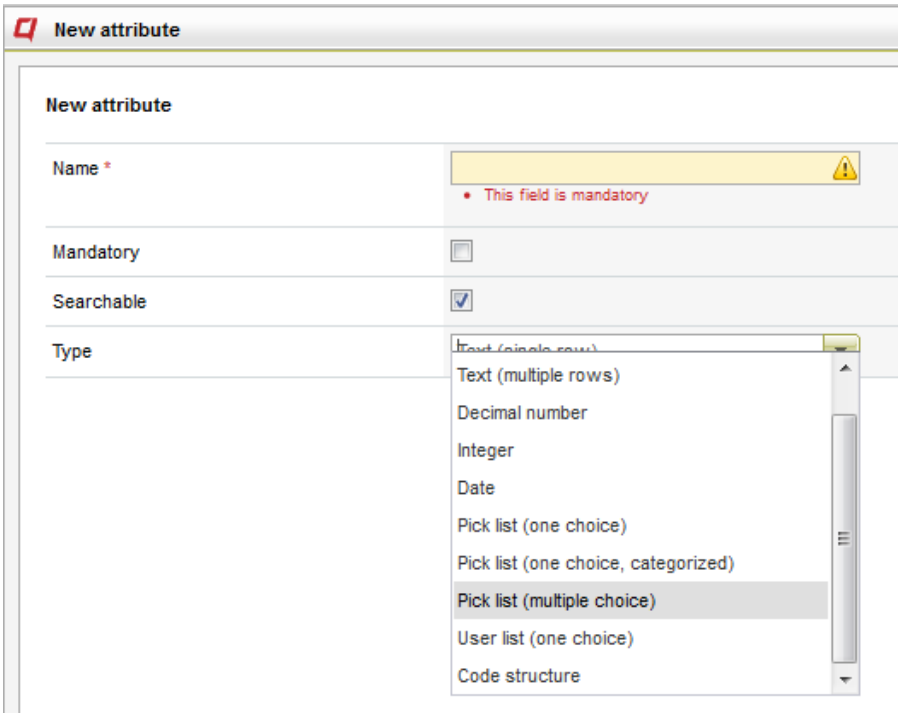
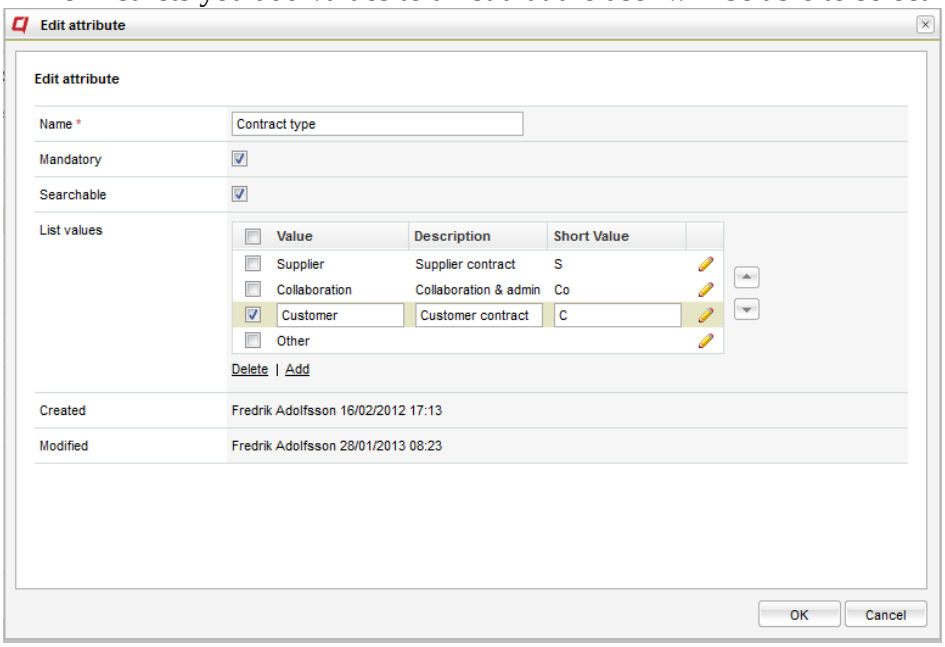
An attribute can be a text field (one or many rows), a date field, an integer, a decimal number, a user or a pick list value (single, multiple or categorized). Once set, the field type for an attribute cannot be changed.



Attributes

"User list" contains a list of workspace users. The administrator has to choose a group to connect to the attribute list. Only users belonging to that group will be displayed.

A Pick list lets you add values to a list that the user will be able to select from.



Pick list attribute

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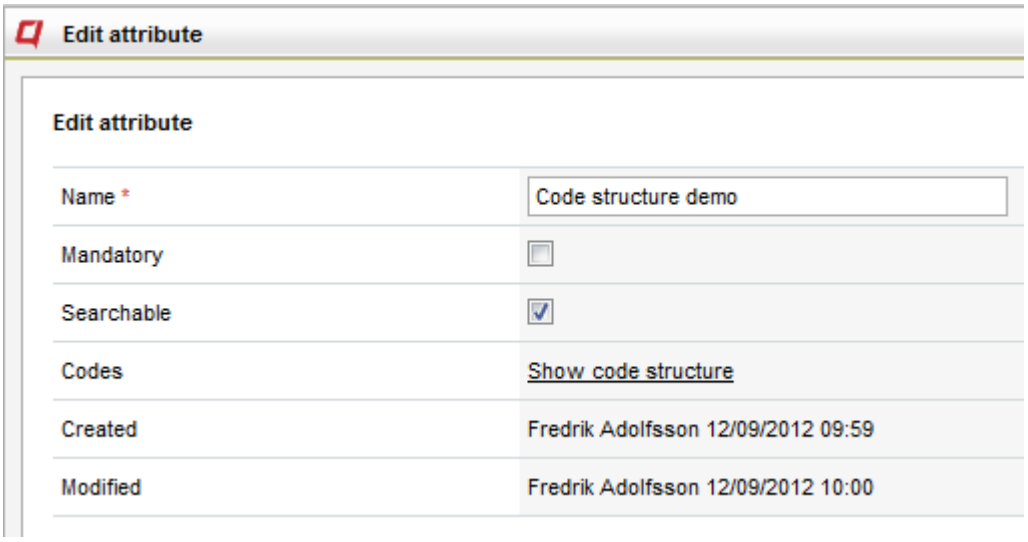
Short Values are visible and used if the function for automatic generation of documents is switched on, see the description below.

“Multiple choice” gives a user a chance to choose more than one value in a pick list.

A categorized pick list is a list where the values are grouped, such as countries grouped into parts of the world.

A Code Structure is a structure with unlimited levels. In searches, a search for a specific name on will give a hit on all sublevels as well.



Code structure attribute

Code structure

In order to create a hierarchy, you must upload an excel sheet with three columns: “Code”, “Description” and “Parent value”, like the example below:

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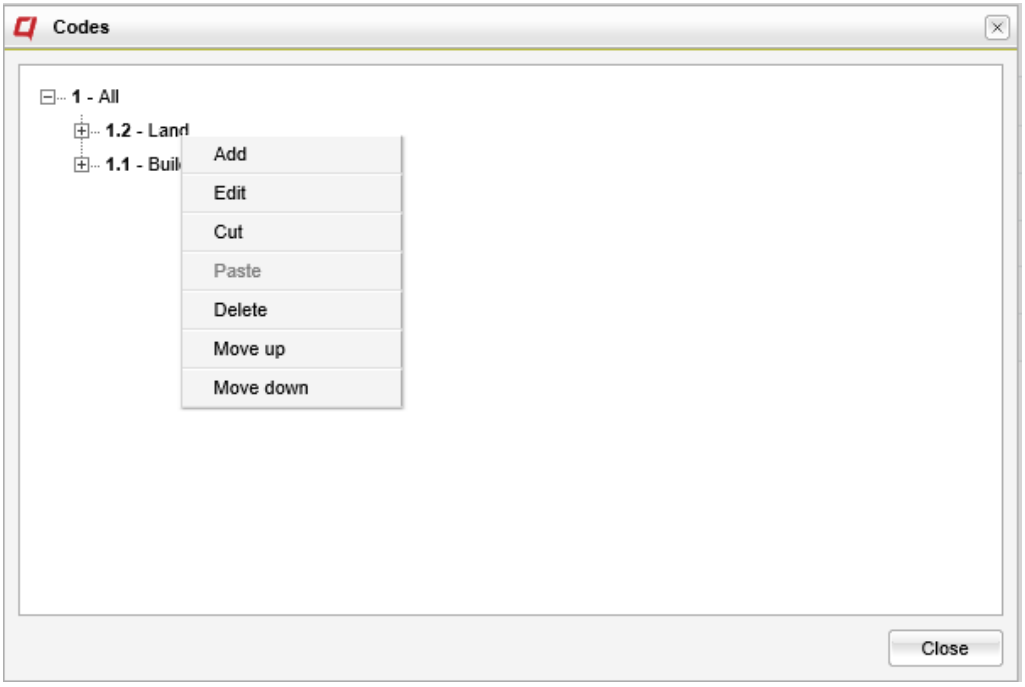
	A	B	C
1	Code	Description	Parent
2	1	All	
3	1.1	Building	1
4	1.2	Land	1
5	1.1.1	Doors	1.1
6	1.1.2	Windows	1.1
7	1.2.1	Fence	1.2

Code structure import list layout

Once uploaded, it is possible to change the code structure. Right click a code value in order to update or delete it, move it in the structure or to add a value below it in the structure.



Context menu for a code structure value.

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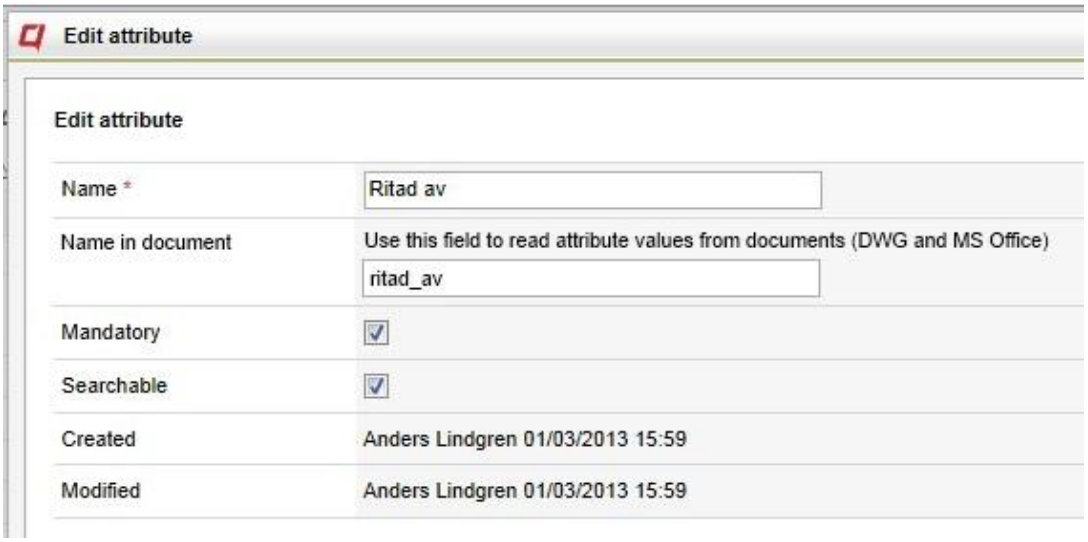
Name in document
If functionality for reading attributes from office files and/or dwg files is switched on, it is possible to add an alias for the attribute field so that the attribute in the file can have a slightly different name from the attribute name and still be read. Use the "Name in document" field for this.



Name in document

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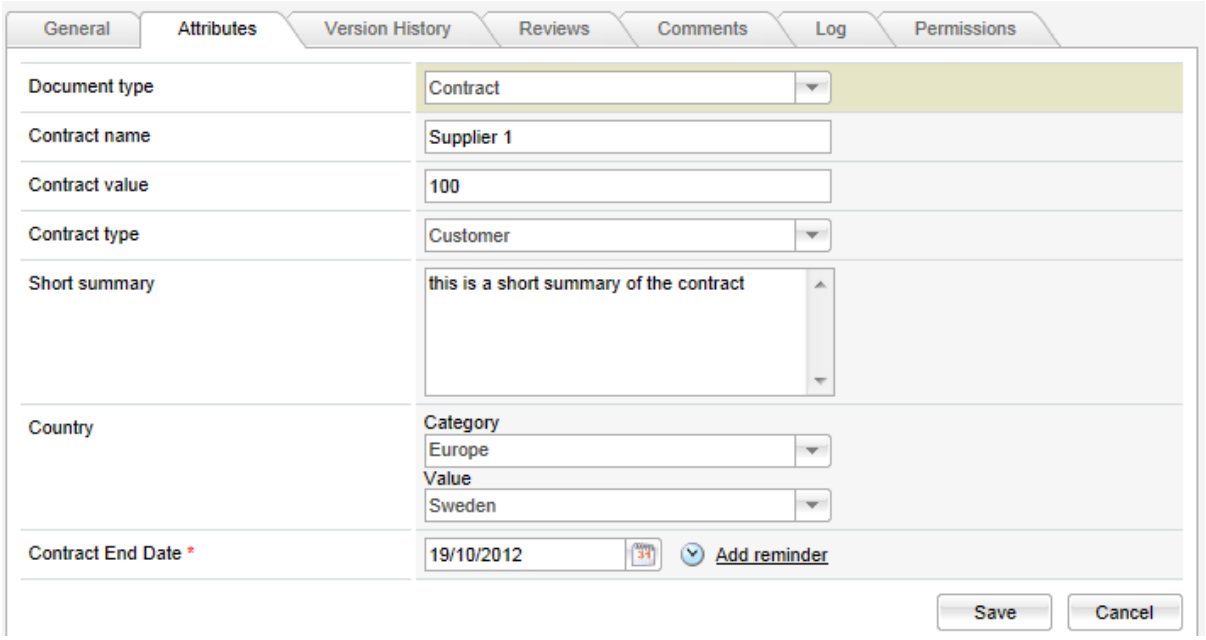
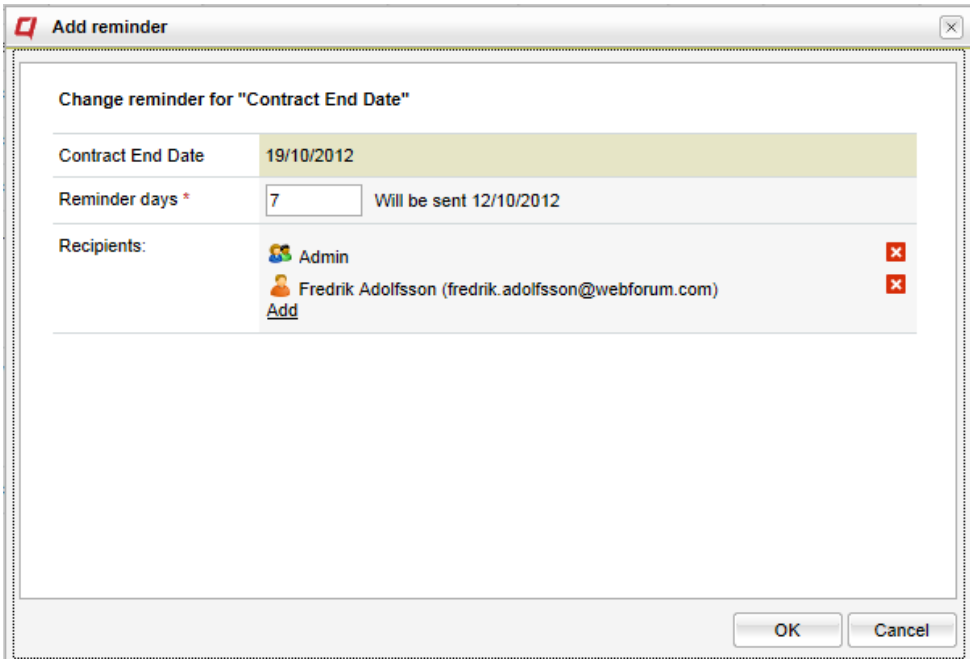
Date Attribute Reminders

It is possible to set reminders for all documents that have date attributes. Just click "Add reminder" next to a date attribute on the attributes tab. This requires update rights.



Add reminder

It is possible to create a distribution list with the users & groups that should get a reminder. The person setting the reminder can choose how many days before the date specified in the attribute that the reminder should be sent.



Add reminder - Details

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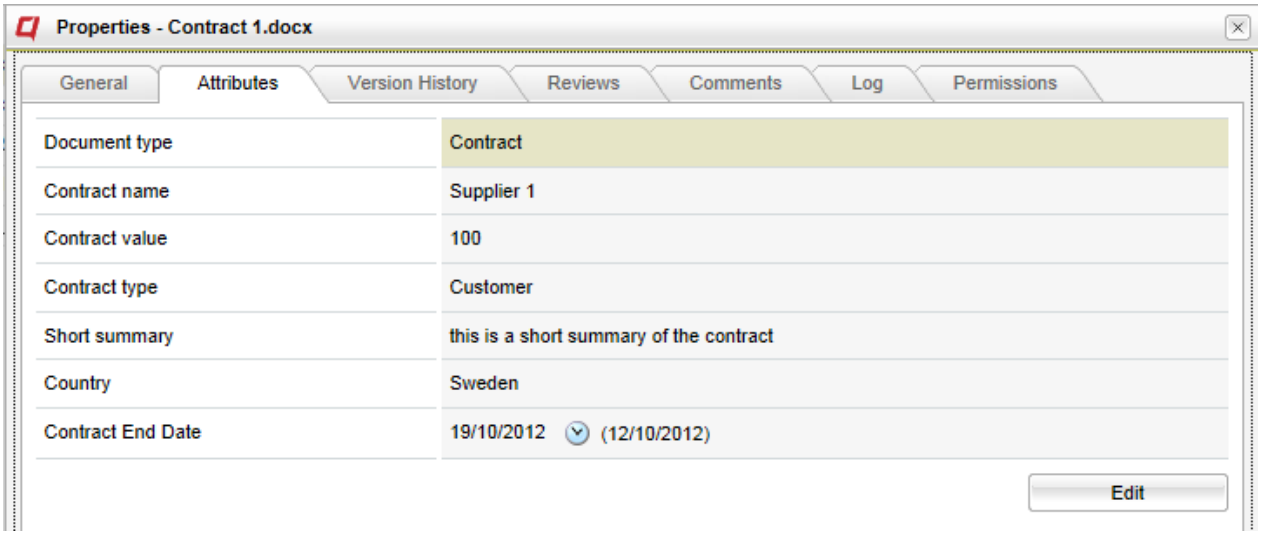
Reminders are shown next to the date attribute that it is set for.



Date attribute with reminder.

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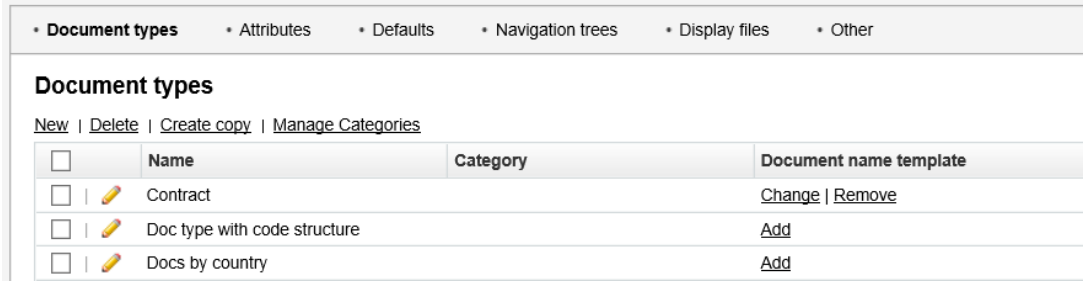
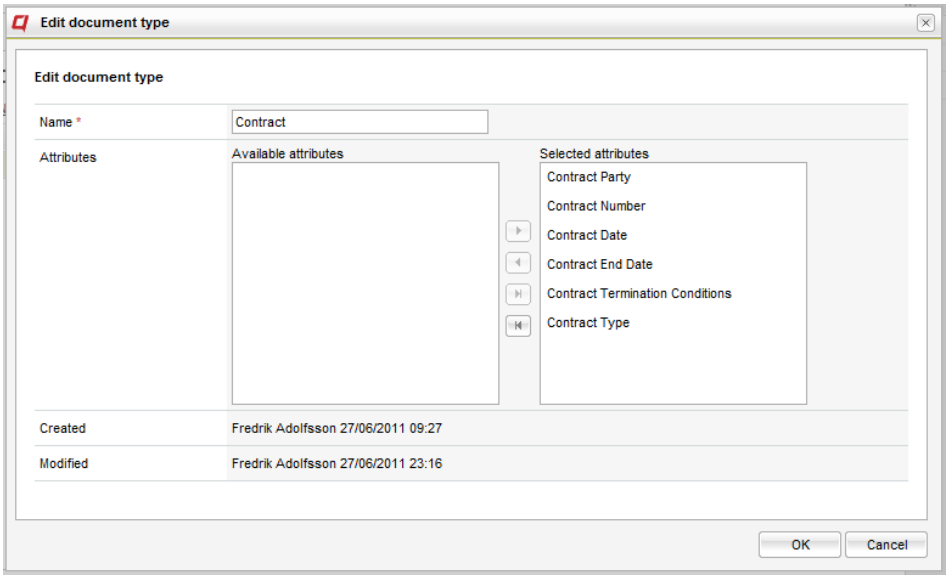
Document types

A document type is a way to group attributes in order to make it easier to find the documents without having to navigate through a folder structure.



Document types

In a company you can for instance have a document type called Contracts. In order to facilitate the administration and use of these contracts, attributes such as Contract Party, Contract Number, Contract End Date, Contract Type, and so on are set. That makes it possible to search for Supplier Contracts with an End Date this year for instance.



Document type configuration dialog

It is possible to copy a document type. This is useful when setting up document types with many attributes that are similar to each other.

It is also possible to create categories (manage categories) and to add document types to a category. The categories are also visible in the attribute search and can be used to limit the document type list.

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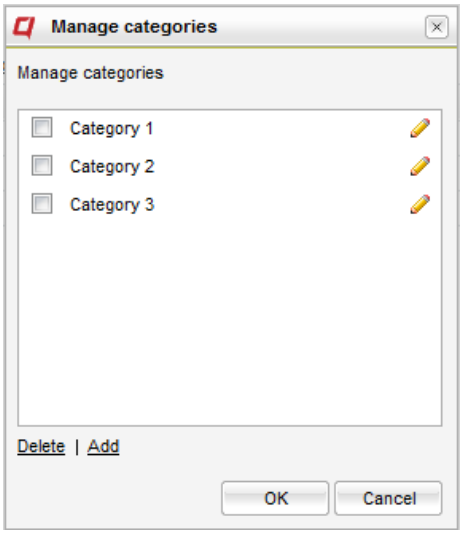
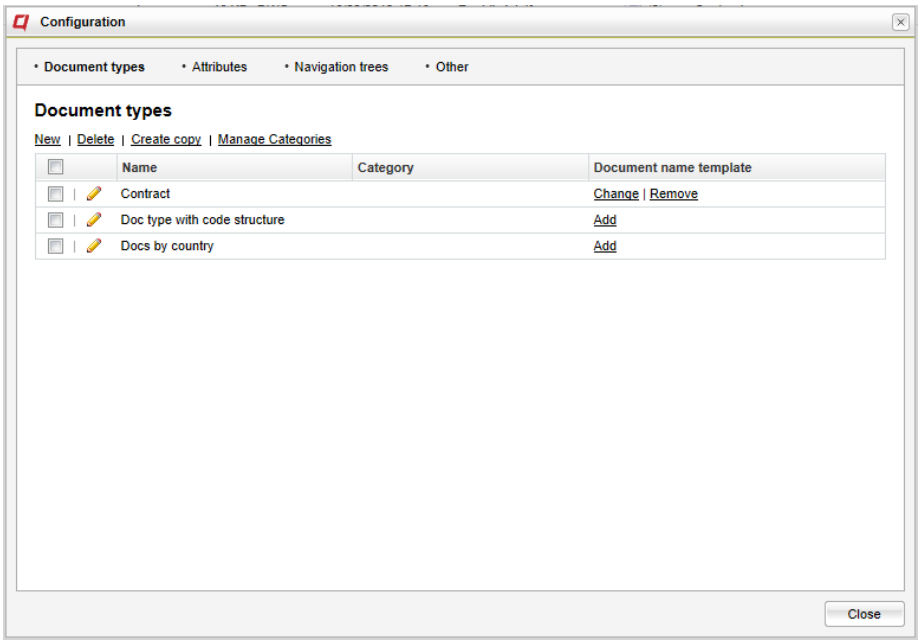


Document type management

Auto-Generated Document Names

It is possible to let the document names be automatically generated by the system based on prefixes, attributes and sequence numbers. This is done for each document type by clicking on the corresponding cell in the Document name template column.



Document types

This will take you to the set up window:

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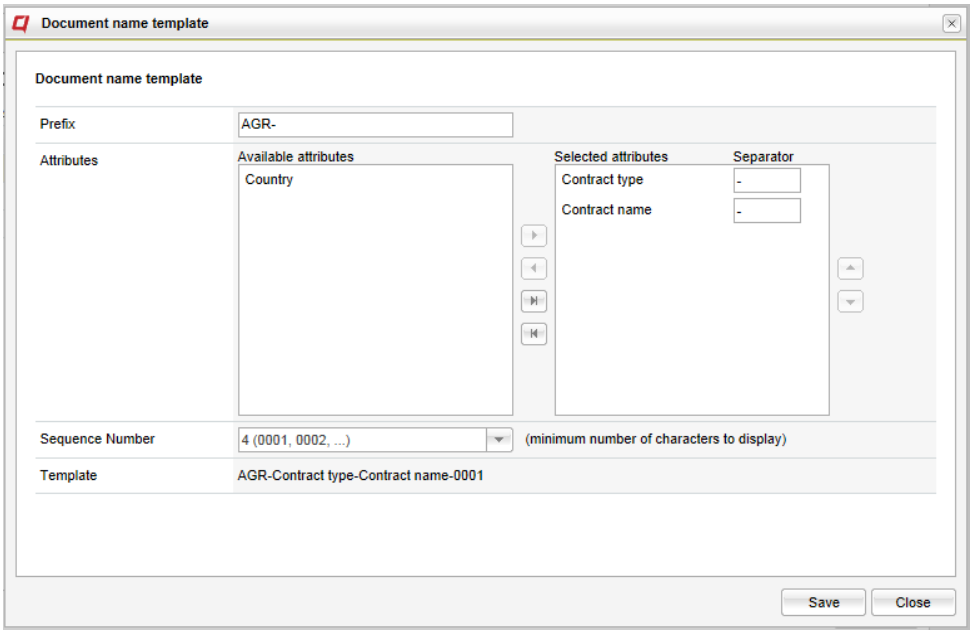

Document Name Template – Setup

The name will have the following structure:
<prefix><attribute 1><separator 1><attribute 2><separator 2>…<attribute n><separator n><sequence number>

The following rules apply to system generated names:

1. The attributes must be mandatory in order to be used in names
2. The attributes cannot be deleted if used in name templates
3. Only short string, pick list, and code structure values can be used in name templates
4. If a list attribute value has a short value (see attributes above), that value will be used
5. The total name length must not exceed 100 characters
6. Names must be unique when generated. This is relevant if no sequence number has been chosen

Names are generated in the following cases:

1. Single document upload via the document archive toolbar
2. Single document upload via the select document dialog
3. Document import (unless the document name already exists in the chosen location, in which case it is instead replaced).
4. Document type specification for a document
5. Document copy (including folder copy)

No names will be generated in the following cases

1. Drag and drop
2. Extract from zip file
3. When attribute values are changed for existing documents

The name will only function as a suggestion that can be changed manually and

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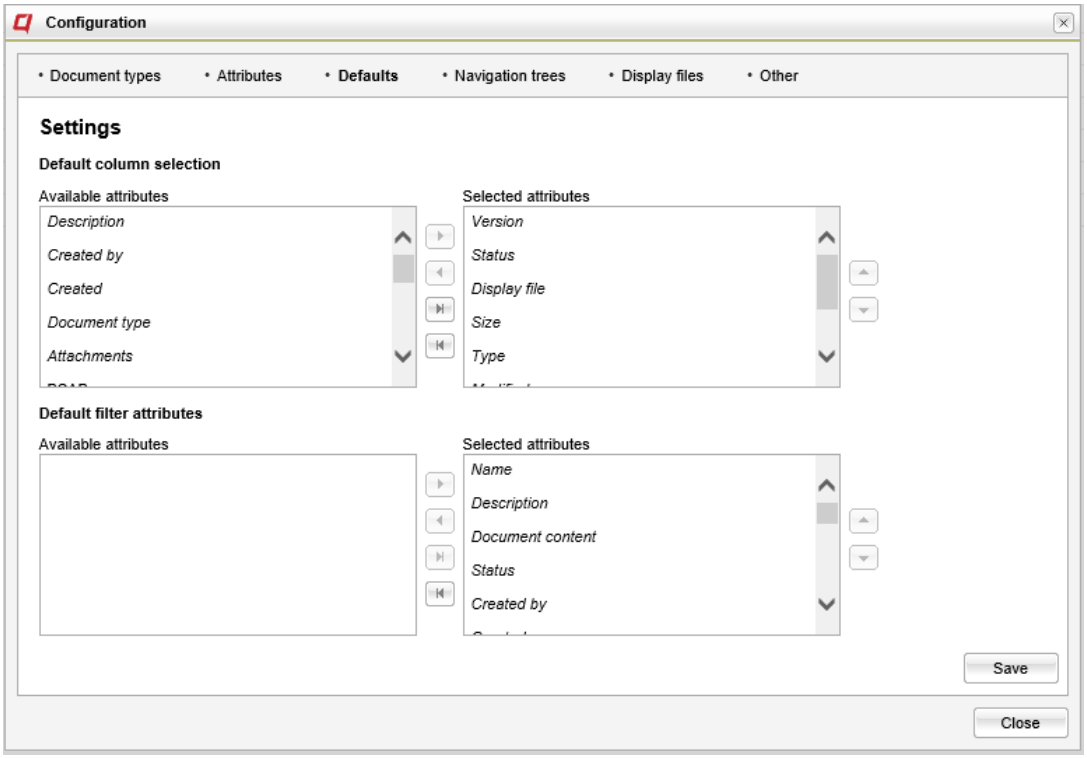
the function will only be switched on upon customer request.

Defaults

It is possible to set default settings for both search filter fields and columns.



The Default column selection controls which columns that should be displayed for users by default when they first start to use a workspace. The Default filter selection controls which filter fields should be available in advanced search for users by default.

After the initial log on, a user can alter the column and filter set up to suit her own needs.

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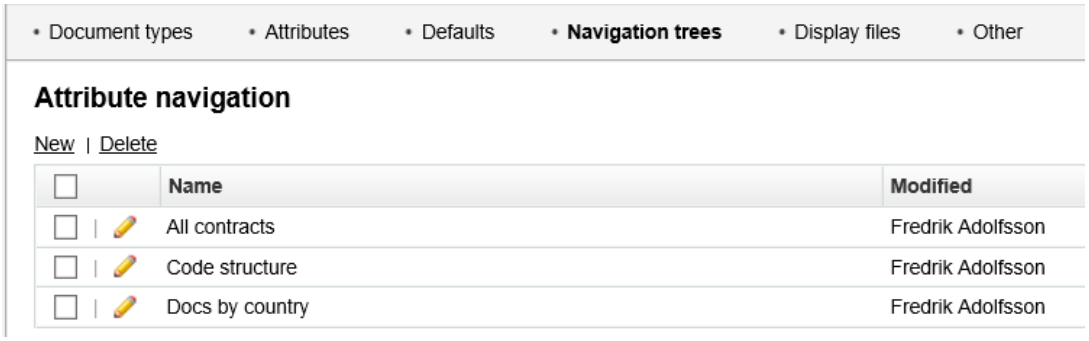
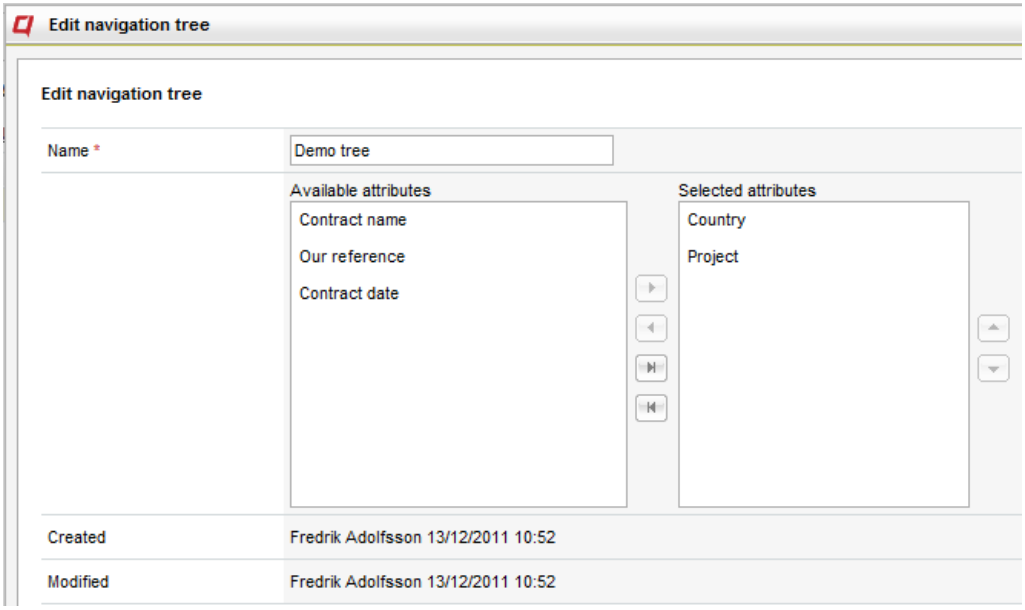
Navigation trees

Navigation trees are a way to navigate to documents using attributes values rather than folders. Choose in which order you want to navigate by selecting attributes in that order. It is possible to create many navigation trees that have different attribute orders.



Navigation trees



Navigation tree configuration

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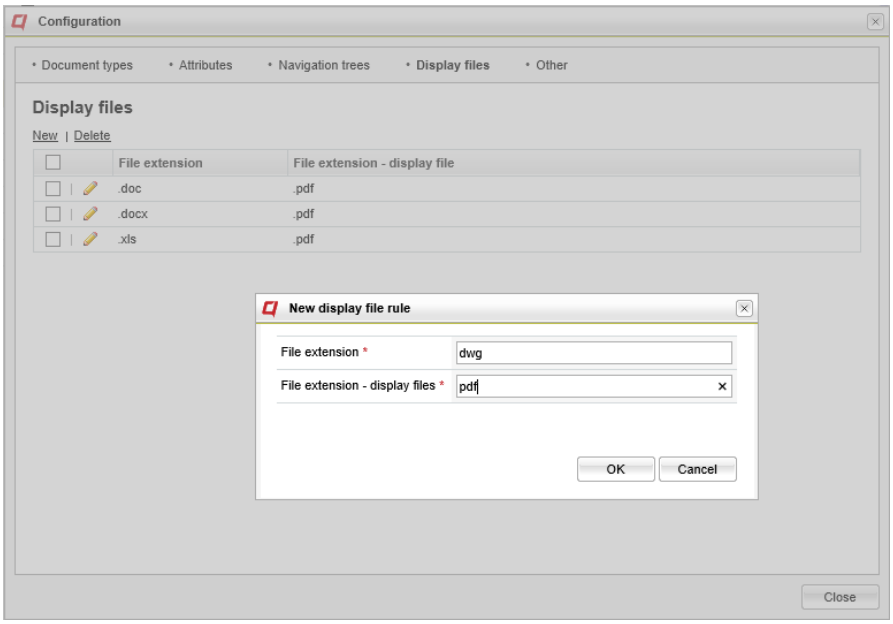
GUI for setting display file connections
There is a display file menu option available under document configuration.
Here it is possible to associate file extensions and display file extensions. For all files types that have associated display files it is then possible for a user to connect such a display file to the normal file via the context menu for the document.

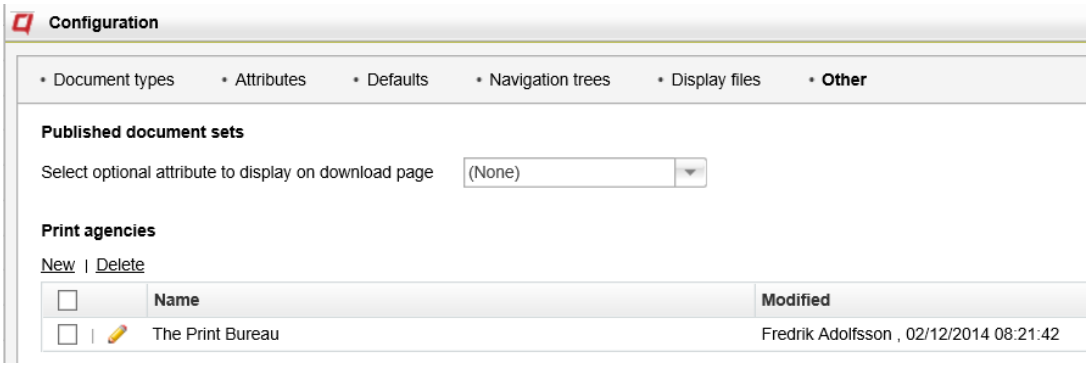


Display file type association

Other
There is an additional configuration section that includes parameters used by the document archive.

It contains parameters for the publication of document sets. Read more about this in the section about publishing sets.

In addition, it is possible to set up Print agencies. A print agency can receive requests for printing documents in a document set.



Configuration - Other

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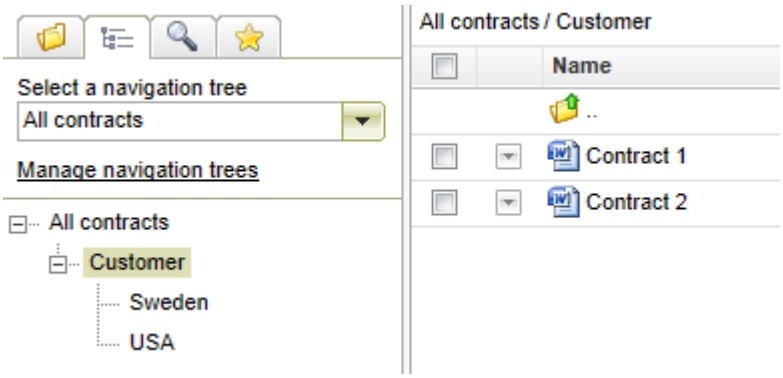
Navigation trees (Professional)

Navigation trees are found as a tab next to the folder tab. The navigation trees are displayed with names and attribute values. You navigate by clicking on them. It is possible to choose which one of the navigation trees in the list that should be opened by default by clicking the checkmark next to the tree name. If none is chosen, the first one in the list will be opened by default.

The attribute name is displayed next to the attribute values when doing mouse over.



Navigation trees

Default navigation tree

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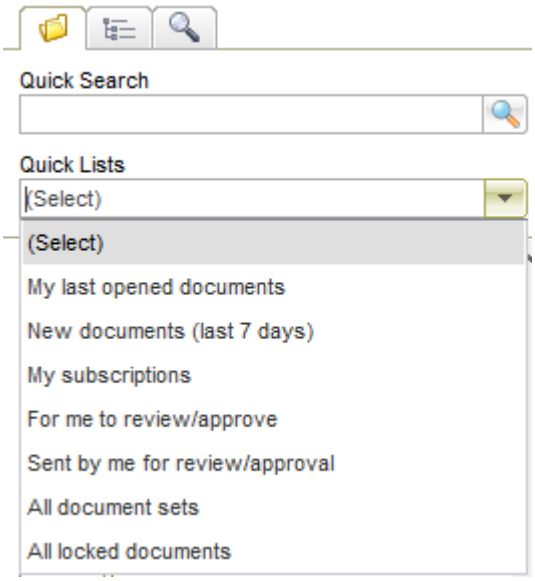
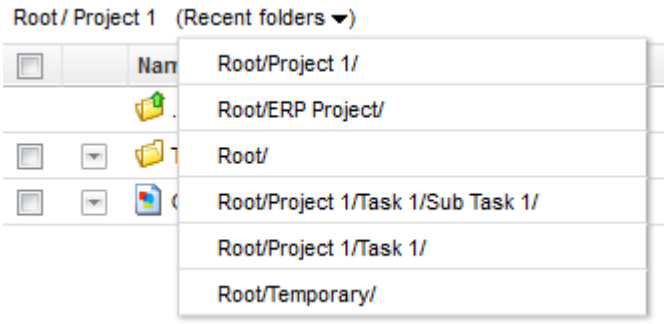
Search

All content in the Document archive is searchable. By default, the Quick search is available in the left pane, as described above. To perform a search, enter the search word or phrase and click on the search symbol. It will search in the name and description fields for documents, folders and sets (professional only). The whole document archive will be searched, regardless of which folder you are currently in.



Quick Lists makes it possible to find documents that have previously been harder to find, such as a document that I must review/approve.

Clicking the “Recent folders” links will take you to a folder that you previously visited.



Recent folders

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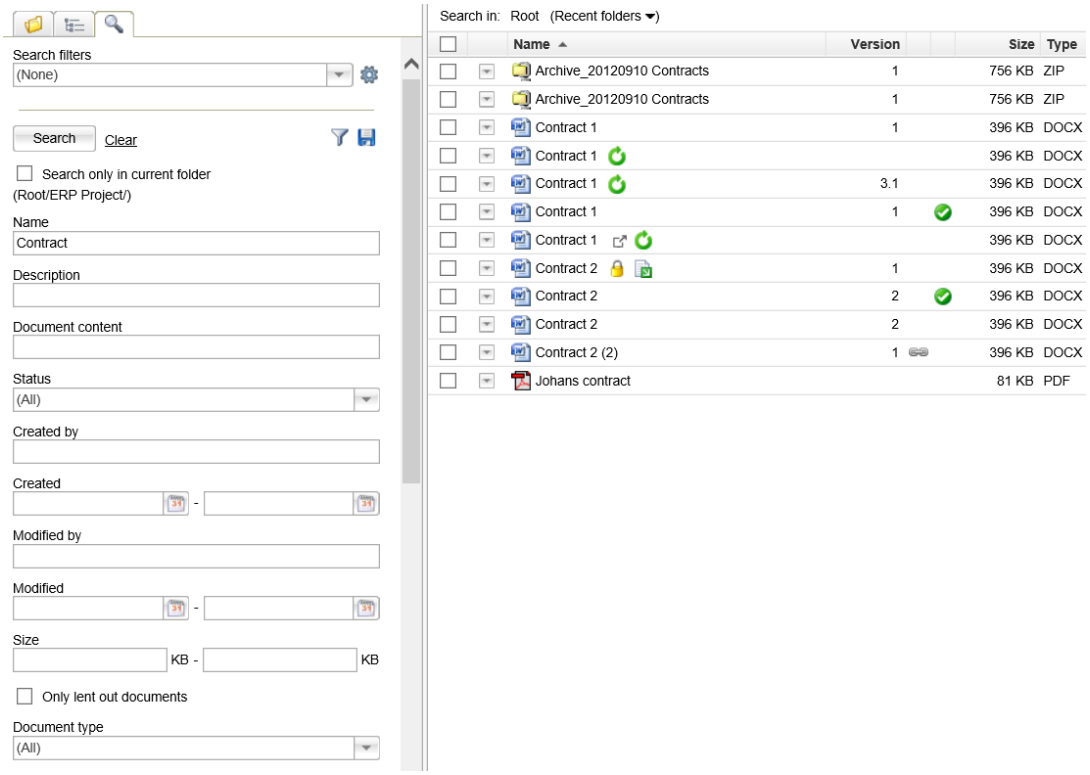
By clicking on the search button tab, more search parameter options are given.



Advanced Search

You can choose to search in the whole document archive, or just in the current folder and folders below it.

If "Content" is checked, the actual contents of the files stored in the Document archive are searched. The searchable file types are Microsoft Office files (Word, Excel and PowerPoint) as well as Adobe Acrobat PDF files.

If the use of document types is switched on for this workspace, then it will also be possible to search for specific documents types and their attributes/metadata. By default, all attributes are visible in the left pane. By choosing a document type, only attributes specific for that document type are displayed.

You can choose filter selection by clicking the funnel icon on the search page.

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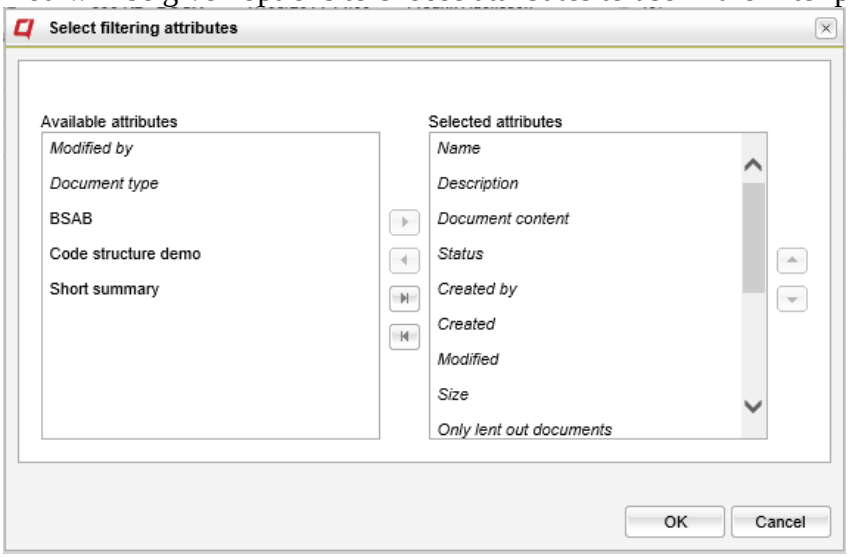
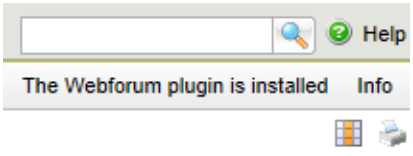
You will be given options to choose attributes to use in the filter panel.



Filter attributes

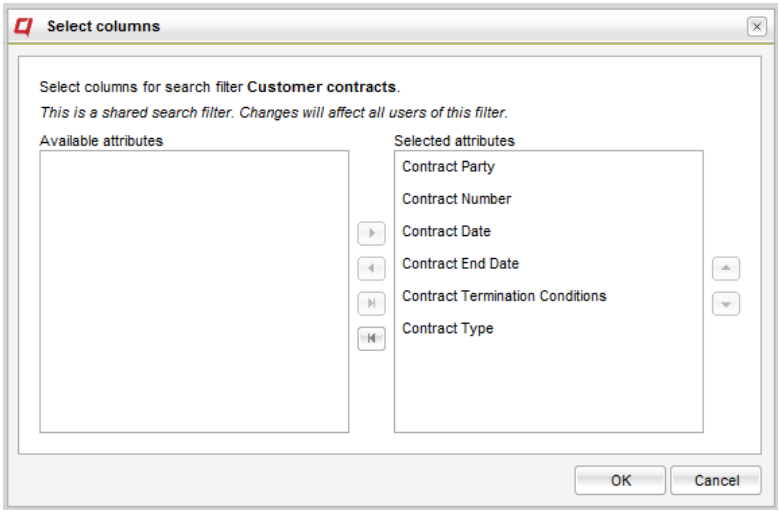
The right pane will display the normal attributes displayed in the folder view plus any additional attributes selected.

Use the attribute display settings found when clicking on the select columns icon found in the top right corner below the Info text in order to choose which attributes to display.



Column selection

Clicking on the select columns icon gives the following pop-up menu:



Columns display settings

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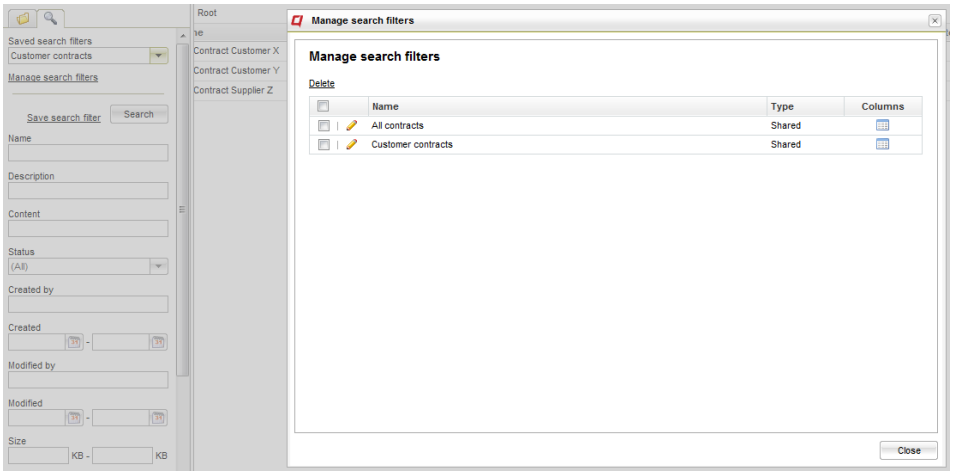
The selected columns will be displayed.

If you want to save a search filter, press the disc icon. This will save the current search together with the selected column settings.

Filters

Clicking the config icon, will open the window for changing existing search filters.



The manage search filters dialog

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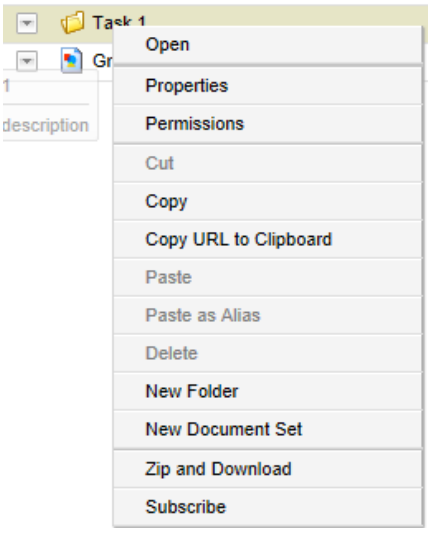
Folders

The Folder toolbox displays the folder structure of the Document archive. The structure can be expanded and collapsed by clicking on "+" and "-" in the structure. It is also possible to move folders within the folder structure by dragging and dropping a folder. To do this, click on the folder, and, while holding down the left mouse button, move the folder to the desired location and release the button.



Menu alternatives when right-clicking on a folder

By pointing the mouse on a folder and clicking on the right mouse button either in the Folder toolbox in the left pane or on a folder on the right pane, a menu is displayed giving a number of options:

Open	Opens the folder and displays the content in the right pane.
Properties	Shows the properties of the folder
Permissions	Opens the permission settings for the folder
Cut	Cuts the folder to the clipboard
Copy	Copies the folder to the clipboard
Copy URL to Clipboard	Copies the web address to the folder (URL) to the clipboard
Paste	Pastes a folder that has either been Cut or Copied
Paste as alias	Pastes an alias for the document (linked document)
Delete	Deletes the folder
New folder	Adds a new folder
New Document Set	Create a new set of documents with specific versions
Zip and Download	Creates a compressed file of the folder and its contents and lets you download this file

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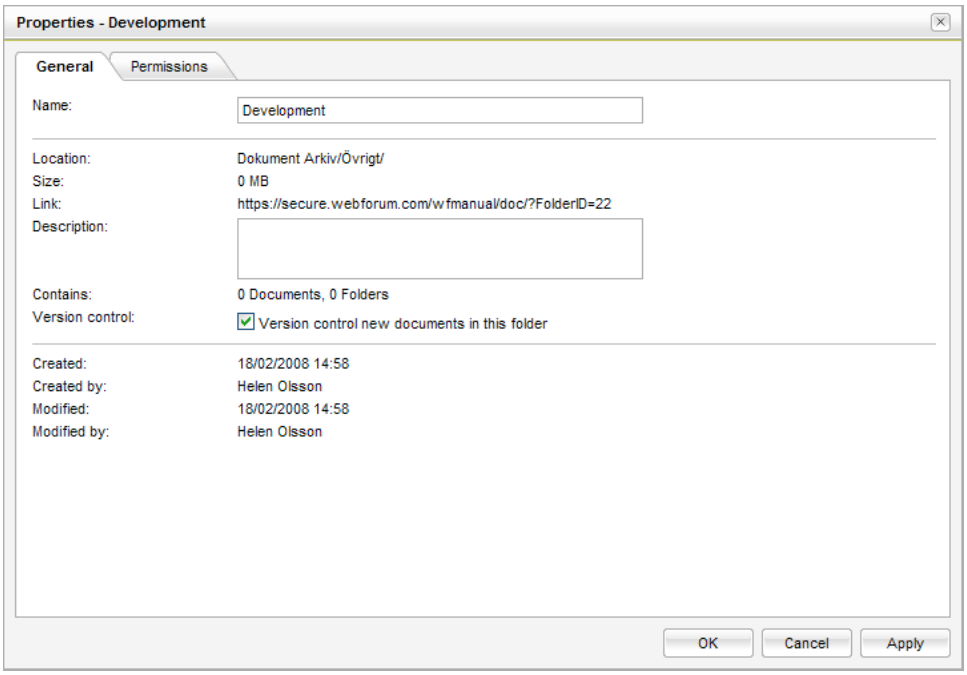
Subscribe	Subscribe to documents changes in the folder and (optional) in subfolders. You will receive an e-mail immediately when a document has been changed

Properties

By clicking on Properties for a folder, a window opens up showing information about the folder and its contents. It is possible to rename the folder and provide a description. It is also possible to select a version control setting for all new documents added to the folder. Version control is explained later in this chapter.



Example of the Properties of a folder.

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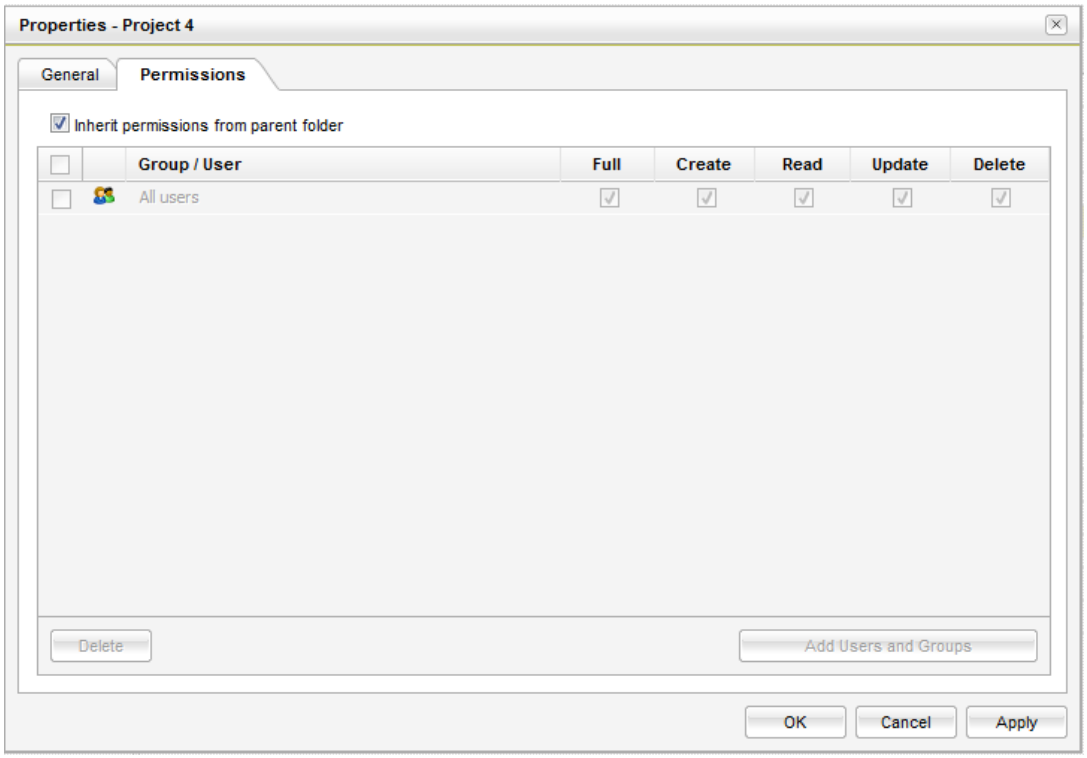
Permissions

By either clicking on “Permissions” in the menu or on the “Permissions” tab while in Properties, the permission settings for the folder are accessed. The functionality of the permission system is explained in a separate chapter called **Permission settings.** There is an option “Inherit permissions from parent folder” which is checked by default. In order to change permissions for a folder, this checkbox must first be unchecked.



Example of Permission settings for a folder.

Recycle Bin

All files and folders that are deleted from the Document archive are stored in a Recycle Bin for a period time, by default 14 days. During this period, it is possible to restore files or folders.

All users will have Recycle bin available, but will only have access to documents deleted by themselves. A document archive administrator will still have access to all documents in the recycle bin.

The Recycle Bin is available at the bottom of the folder structure.

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Uploading files and folders to the Document archive

Uploading files and folders can be done in the following ways

- by dragging and dropping files
- by using the Toolbar
- by uploading and unzipping a zip file
- by using the import function (professional)

The former requires that the Webforum plugin has been installed.

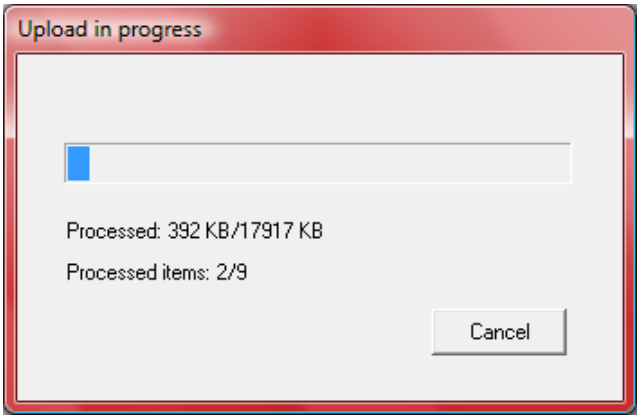
Drag and Drop

Drag and drop allows you to drag documents and folders from your local folder system to the workspace in almost the same way documents and folders are moved between folders in your local file structure. To use drag and drop you must install either the plugin for Internet Explorer or the extension for Firefox.

1. Open up the folder in the Workspace, where you want to save the documents or folder. If no folder is selected, the files or folders will be stored in the root directory.

2. Select one or many documents or a folder in your local folder structure and press the left mouse button.

3. While the left mouse button is pressed down, move the mouse to the browser with the Workspace and release the mouse button. You will see a progress bar showing how many kilobytes of data and number of items that have been processed.



Progress bar showing how many kilobytes of data and number of items that have been processed.

4. The documents and/or folders have now been transferred to the correct folder on the Platform.

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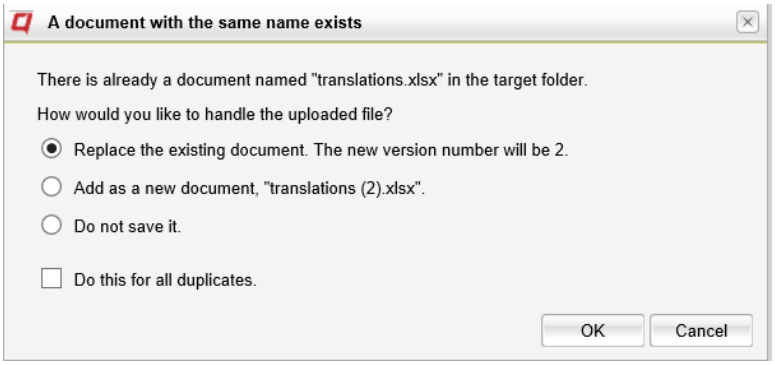
5. If an uploaded document has the same name as an existing document in the same target folder, you will be asked if you want to create a new document or replace the existing one

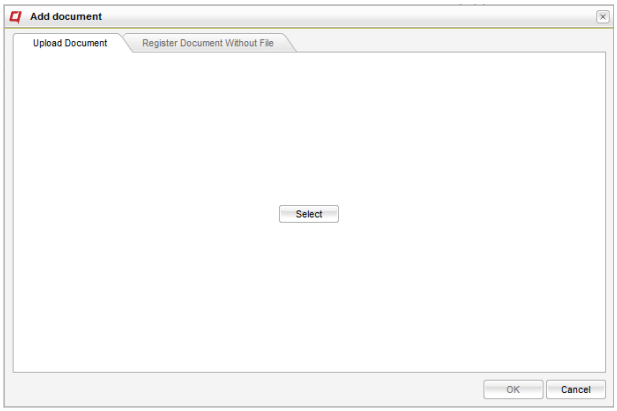

A document with the same name exists
There is already a document named "translations.xlsx" in the target folder.
How would you like to handle the uploaded file?
Replace the existing document. The new version number will be 2.
Add as a new document, "translations (2).xlsx".
Do not save it.
Do this for all duplicates.
OK
Cancel

Replace documents via drag & drop

Uploading files and folders using the Toolbar

An alternative method of uploading files and folders is to use the Toolbar. To create a folder, click on the Create new folder icon and provide the folder name.

To upload files, click on the Add document icon and select the files to be uploaded from your local computer or network.



Upload document

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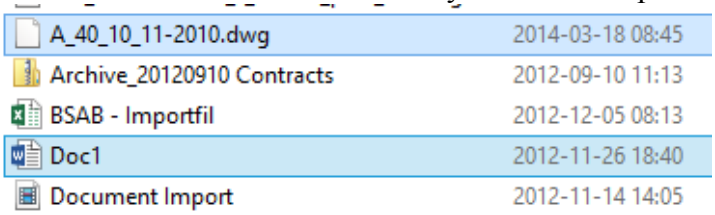
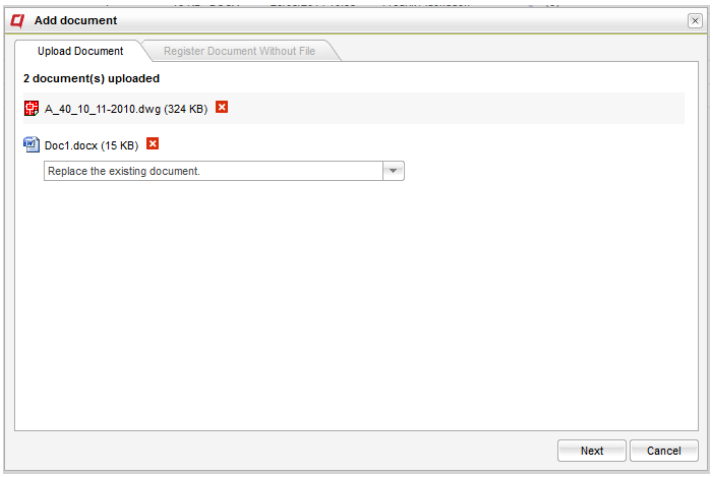
If you have metadata switched on for your workspace, the upload document dialog will give you an option to choose document type (professional only):

Press ”Select” to choose files from your local computer.



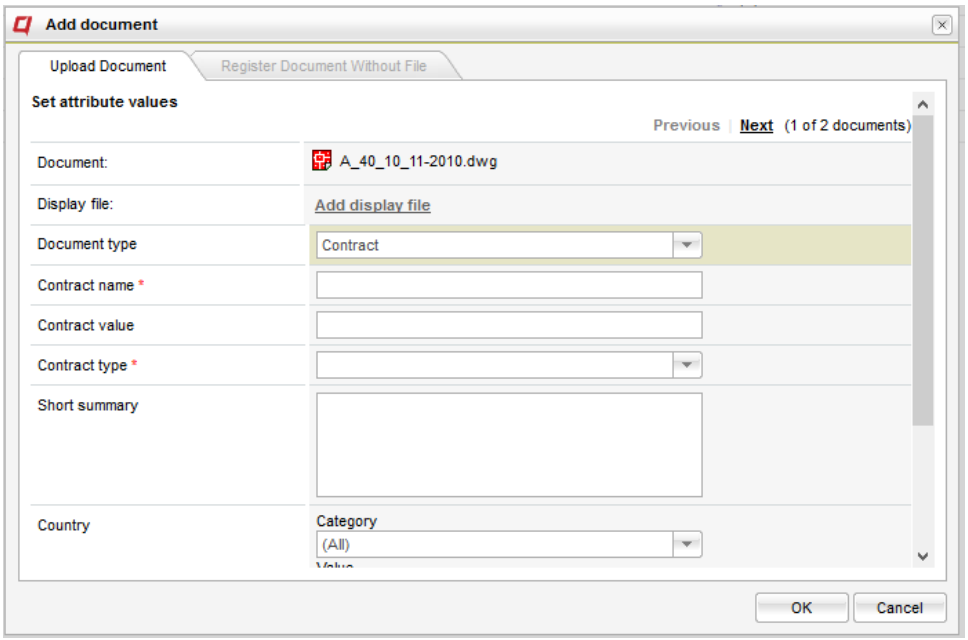
File selection

If a file already exists, you will be asked if you want to replace it or create a new document.



Upload options

If your workspace is using Document Metadata, press ”Next” to set Document Type and Document to set this for more documents, the documents will then be uploaded.



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Set document type and attributes.

If an MS Office document (word & excel) has attribute or header information in the file, that info is compared to attribute names in the system when uploaded. If they match, the document attribute/header values will be suggested as attribute values by default.

The syntax for this is "*Attribute name: Attribute Value*" and the attributes should be tab separated. See example below:

Contract name: Test Contract 1 Contract Date: 2013-01-01

Test Contract Example

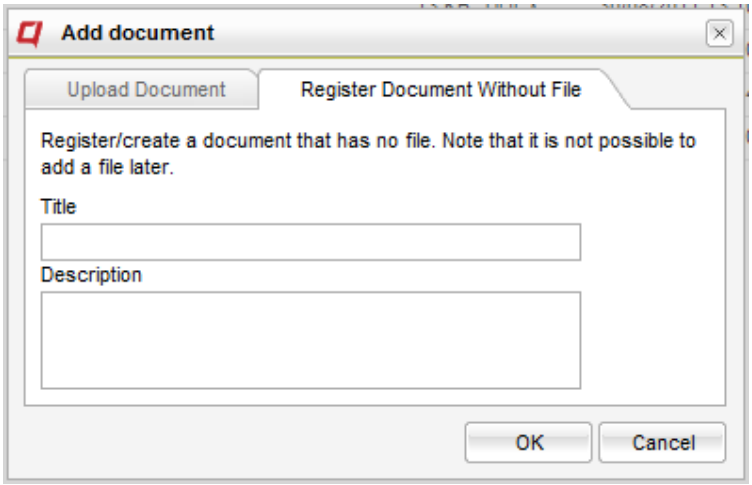
Attributes in document header

Drawing (dwg) metadata can be stored as attribute values automatically. The system will read data from the drawing stamp in a similar way as from MS Office documents, i.e. based on matching attribute names.

It is possible to specify that an attribute should be automatically updated with new values from the document during edit online or replace.

It is also possible to register a document without a file. This is useful when there is an original stored elsewhere, which you still want to store metadata about. It could for example be an original of a signed contract. A registration/document without a file gets the following icon: .

In order to register a document without a file, simply choose the standard "Add document" button in the toolbar, then choose the "Register Document Without File" tab.



Documents without files can still have a document type and metadata.

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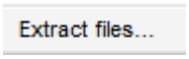
Uploading and unzipping a zip file

Upload a zip file using one of the methods above and then choose the “Extract files…”
context menu option for the zip file.



Read more about this under “Extract files”.

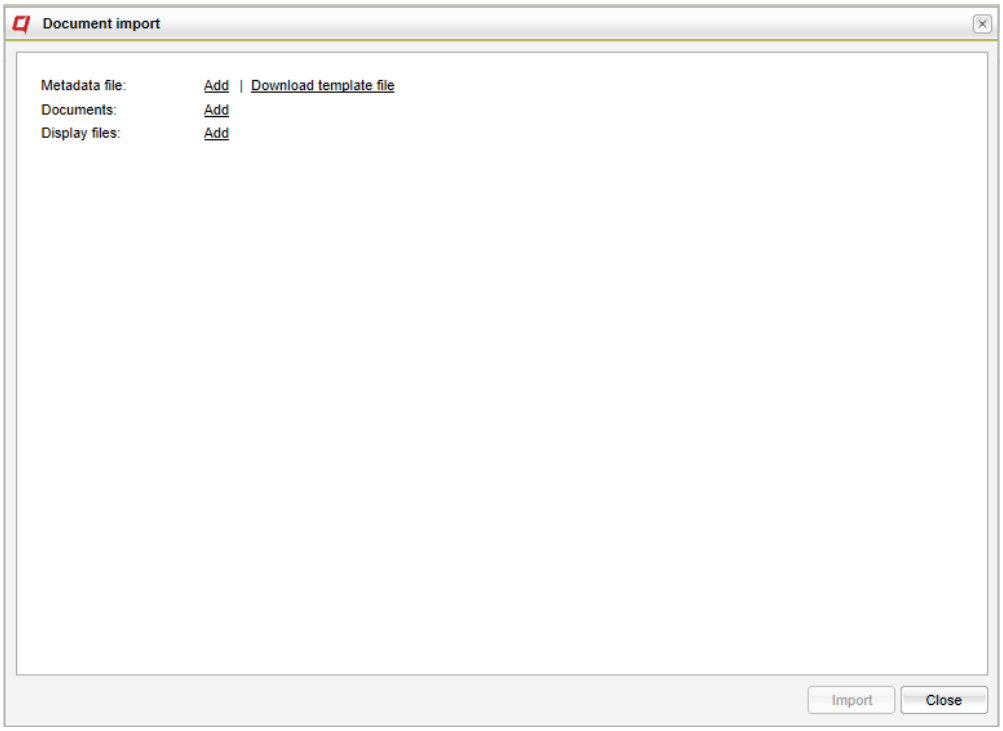
Importing multiple documents including attributes (Professional)

The import function is used when multiple documents and their metadata shall be uploaded. If you do not want to add metadata, you can of course still use the normal drag and drop function to add multiple documents to the system.

In order to import, you need to create a zip file containing the documents you want to upload. You must also create an index file in Excel format. The index file should contain the file name, the location where the file should be placed, the document type as well as the attributes. Please note that attributes containing names from a user list should be e-mail addresses for uniqueness.

	A	B	C	D	E	F	G	H
1	**File Name**	**Location**	**Description**	**Document ty**	**Project**	**Contract name**	**Our reference**	**Contract date**
2	Contract 1.docx	Root/Project 3		Contract	Project 1	Bank customer	fredrik.adolfsson@aducera.com	29-08-2011
3	Contract 2.docx	Root/Project 3		Contract	Project 1	Bank customer2	fredrik.adolfsson@aducera.com	29-08-2011

The import window is very simple, just add the zip file as well as the index file. Please note that the Destination indicated in the dialog does not influence where the files will be put, it is the location column in the index file that matters.



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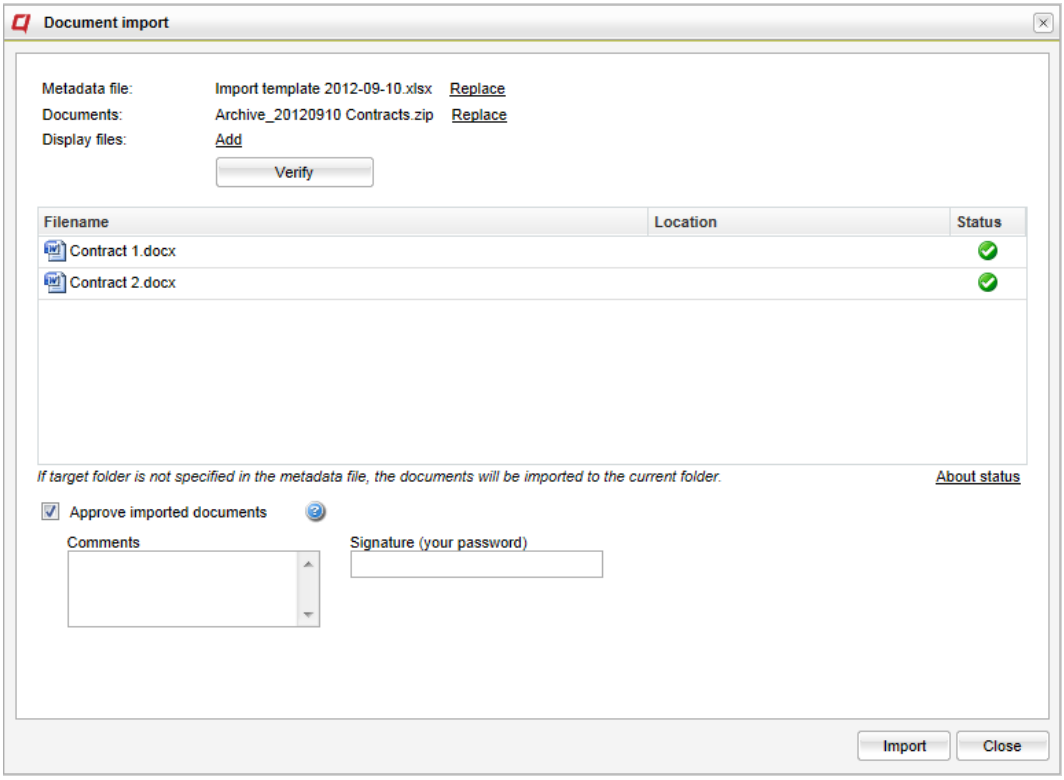
When importing documents, it is possible to upload display files together with the normal files. In the metadata file, there is an optional column where the display file name can be entered. If a name is entered, that file must be present in the display zip file.

If there is an error in the import file format, an error/warning message will be shown if you do mouse over on the symbol.



Import and approve documents

It is possible to approve documents directly when they are imported. This is done by checking the "Approve imported documents" checkbox. Checking this will show a comment field as well as the mandatory signature field.

It is also possible to unlock the documents when uploading new versions of documents that are already in the system.

If the document contains attribute values that can be automatically read, they will be read also when the document is imported. If the excel file contains values for such attributes, they will be read instead of the file values.

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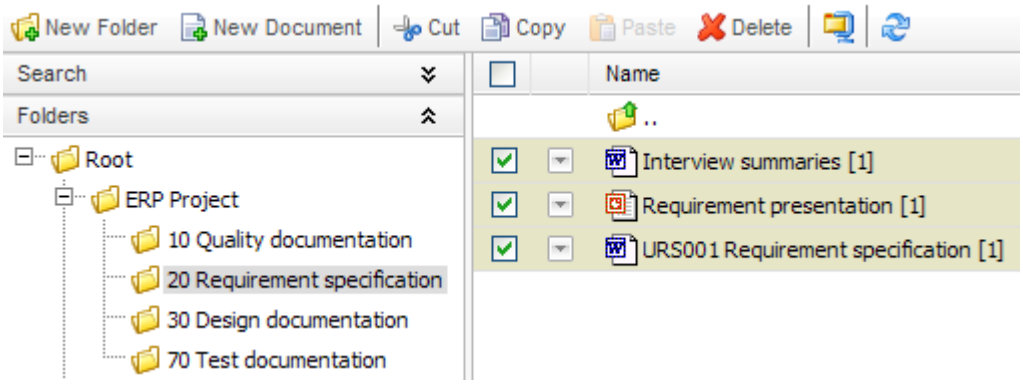
Projectplace import

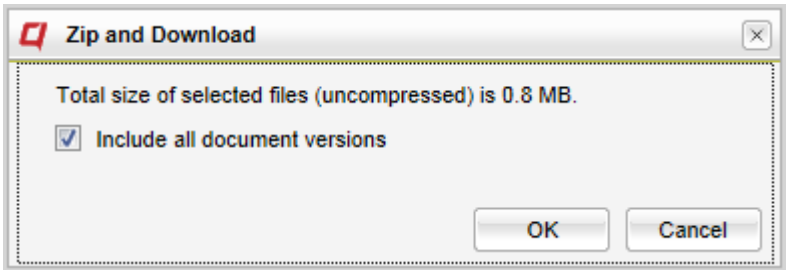
Documents, folders, users and groups can be automatically added from Projectplace.com. Contact Webforum or a Webforum reseller for more information.

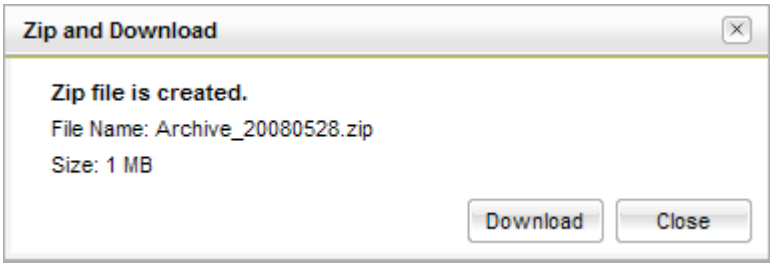
Downloading multiple folders and/or files from the document archive

The zip function allows users to download multiple folders and documents to their own computer. In order to do this, select the folders and files you want to download, and then press in the document archive menu.



You will now get information about the amount of data to be downloaded (uncompressed). You can now choose to include older document versions as well in the download. After pressing OK you will receive information about the size of the download file.





When you press “Download”, a standard download message will follow and you can choose between opening and saving the downloaded file. If you have chosen to

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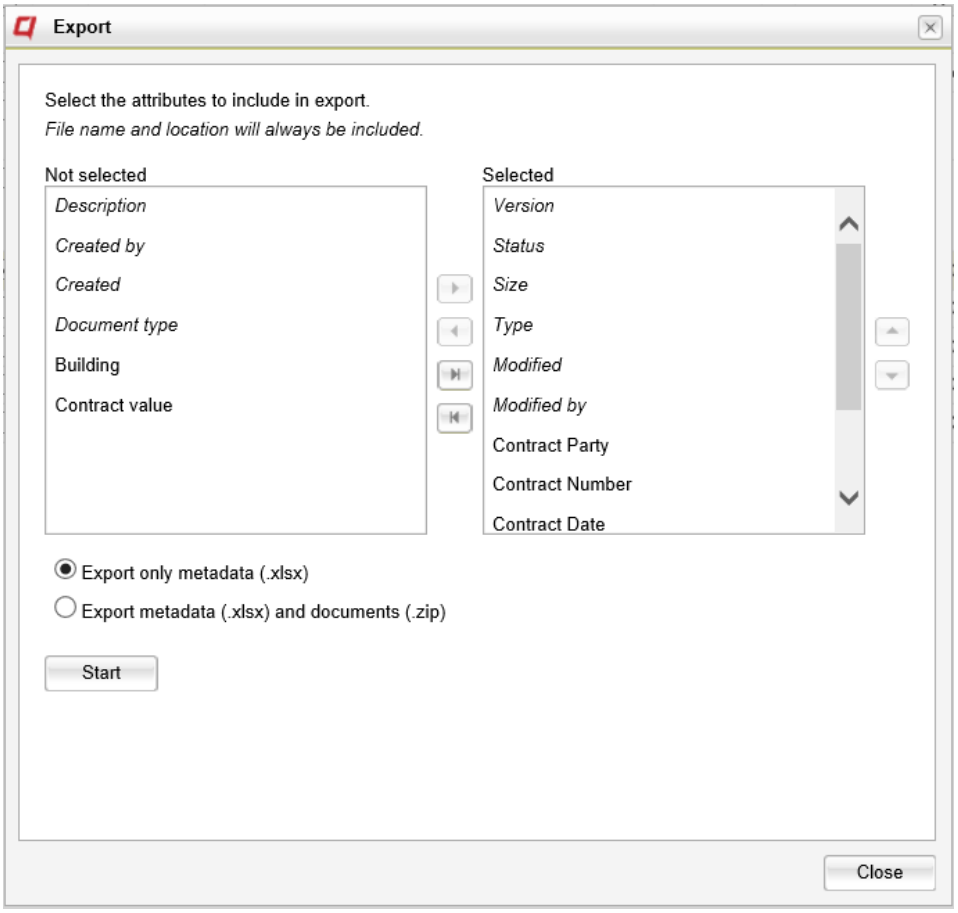
export old versions as well, the files will get version numbers within brackets at the end of the file name, i.e. “File name (1.2).doc”.

There is a maximum figure for the amount that can be downloaded. If this is exceeded you will get an error message. You can of course always download the same amount by using the zip down function multiple times.

Exporting a metadata index file plus multiple documents (Professional)

The export function makes it possible to export the chosen documents as well as the corresponding metadata. You can choose which attributes to include in the export. If you only want to create and index, it is enough to export the metadata. The index file will be in an Excel format.



Export

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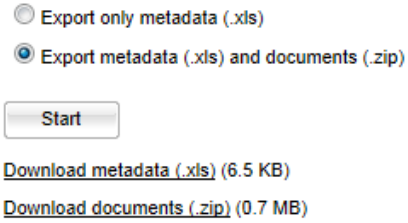
Clicking start will give generate download links.

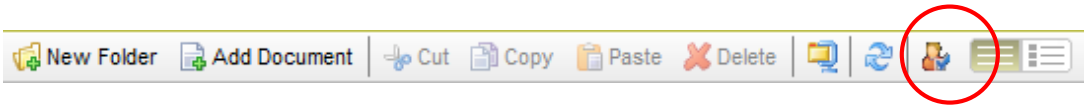

Export only metadata (.xls)
Export metadata (.xls) and documents (.zip)
Start
Download metadata (.xls) (6.5 KB)
Download documents (.zip) (0.7 MB)

Any display files present will be automatically added to a display zip file that also can be downloaded.

When exporting documents with attachments, there will be one additional file for document attachment metadata and one extra zip file for attachments.

Show user permissions

Use Show user permissions to see which documents and folders a user can access. (This feature is only available to document archive administrators.)



When you click on the icon for ”Show user permissions” a dialog window is opened where you first select a user. All folders and documents that the selected user has permission to see are then listed, with the user’s permissions for each folder and document. The list can be exported as an MS Excel file.

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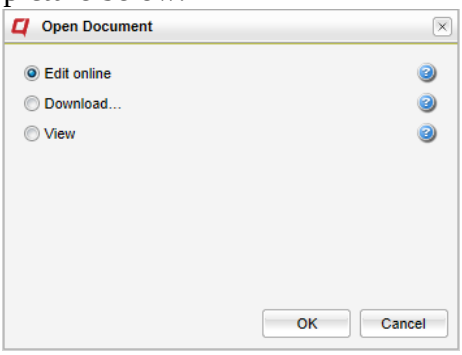
Working with files in the Document archive

Clicking a document name in the list opens a dialog where the user can choose how the document should be opened. The options that can be available are shown in the picture below.



Open document

Use **Edit Online** if you want to open the document on your computer to make updates that should be saved back automatically to the document archive. This option will download the document in the background and then start the program associated with the document's type. When you save the document it will be sent back to the document archive. This option is only available if the user has permission to update the document and has installed the Webforum Plugin (available for Internet Explorer and Firefox). Edit Online primarily works together with MS Office. Webforum does not test edit online with other programs. There is more information about edit online and the Webforum Plugin later in this manual.

Use **Download...** if you want to fetch the document to your computer and work with it there. If you make changes they won't be saved back to the document archive.

Use **View** if you want to open the document in the built in viewer. The document viewer can handle most file formats. The viewer is an add-on that is not available on all workspaces. Contact Webforum for more information.

All users do not have access to all three options. What options a user has is determined by workspace settings, permissions, and other things. For Professional users, there may also be display files available for viewing. Read more about this in the section about display files.

To access all options for the document, right click with the mouse on the file or click on the dropdown menu to the left of the file name.

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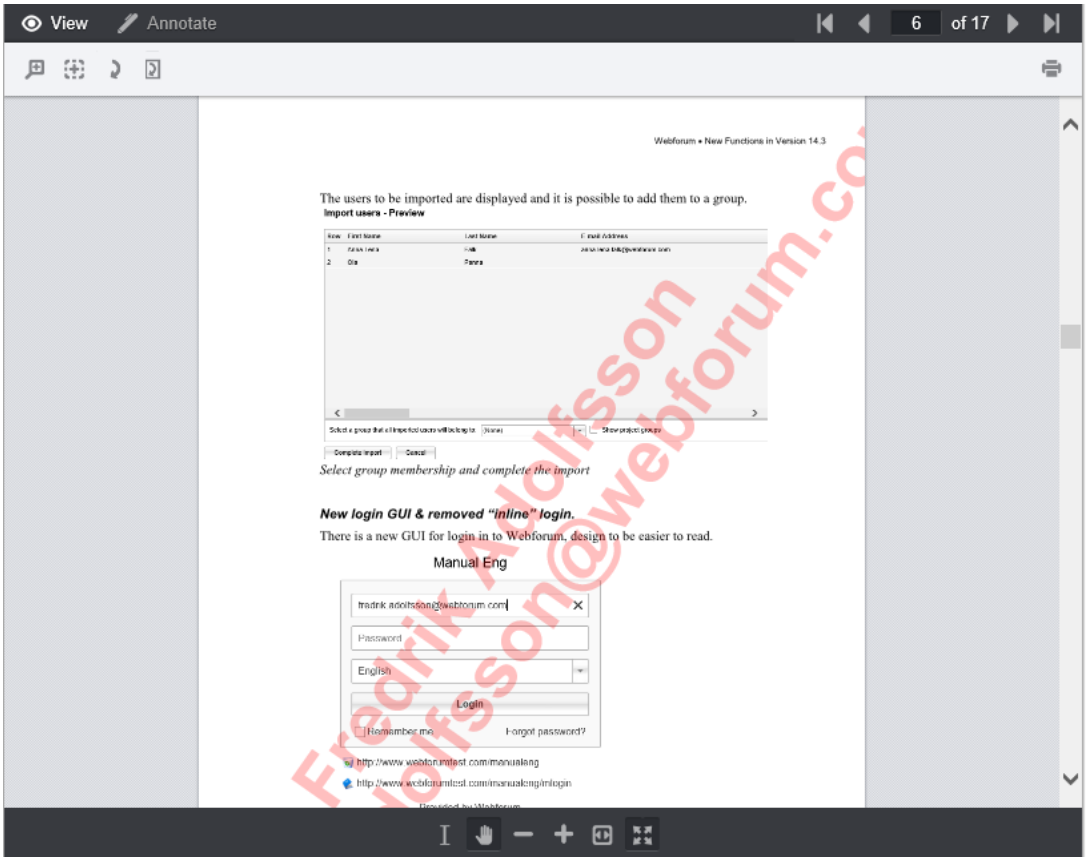
The Prizm viewer has the following look:


View
Annotate
6
of 17
Webforum • New Functions in Version 14.3
The users to be imported are displayed and it is possible to add them to a group.
Import users - Preview
Select group membership and complete the import
New login GUI & removed "inline" login.
There is a new GUI for login in to Webforum, design to be easier to read.
Manual Eng
Password
English
Login
Remember me
Forgot password?
Fredrik Adolfsson
fredrik.adolfsson@webforum.com

Prizm viewer

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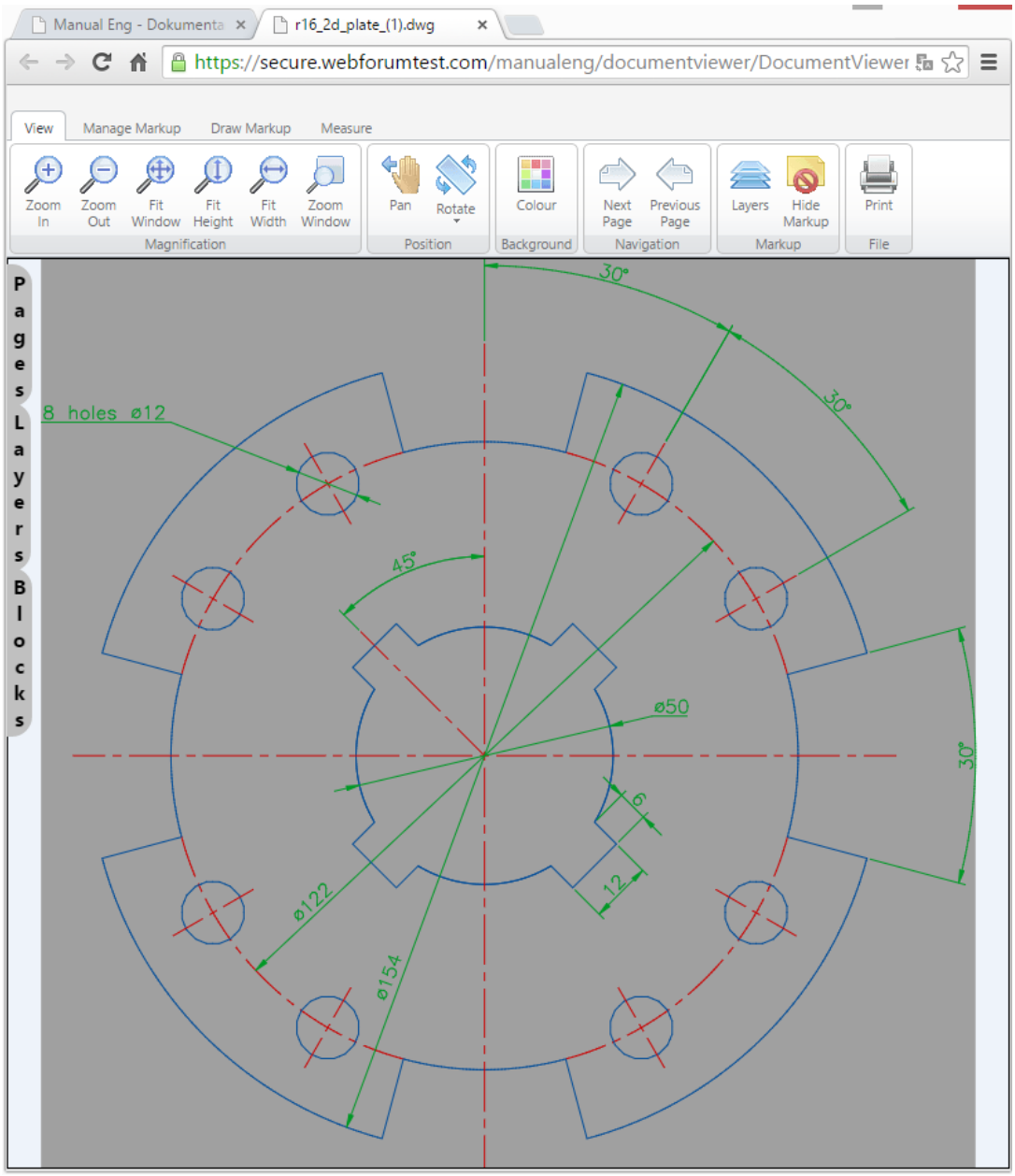
Workspaces with the drawing viewer Rasterex can use it for more advanced functions, such as markups (redlining) and advanced measuring functions. Most of the Rasterex functions can be switched on upon request. Please see the Rasterex User Manual on the Webforum support page for a description of all the different functions that are available.

You can save your personal redlining to the server. It will appear the next time you open a drawing. You cannot see other people's redlining.



Rasterex.

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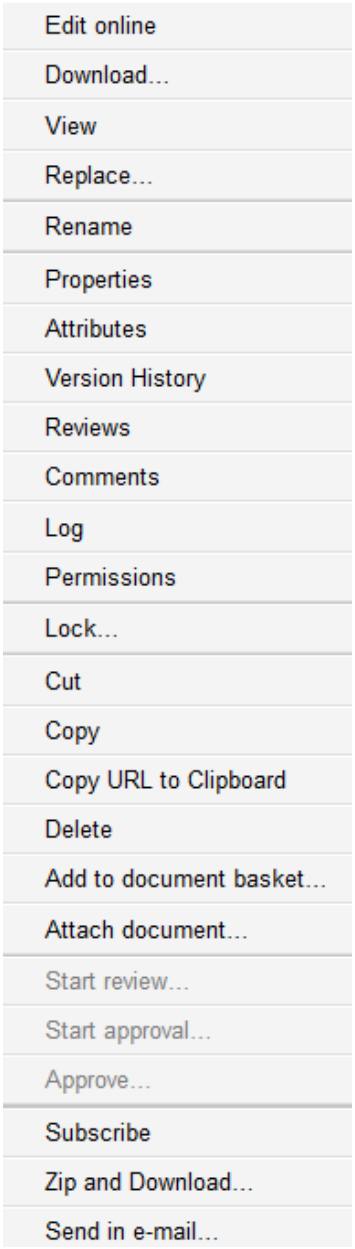
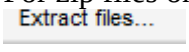
Available options for a file when clicking on the dropdown menu or right-clicking with the mouse:



For zip files only:



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Edit Online	Lets the user open the file to the local computer. The changes are saved to the document archive.
Download…	Lets the user open or download the file to the local computer. If changes are made to the file, they are **not** saved to the document archive.
View	Shows the document in the built in viewer.
Replace	Replaces the selected file. When a user makes a replacement, the previous version is stored. The old file is still available if version history has been activated.
Add/Replace/ Remove display files	Add an alternative file for viewing (such as a pdf version of a drawing) If a display file is already present, there will instead be options to replace and remove the display file. (professional only)
Rename	Lets the user rename the file
Properties	Shows the properties for the document.
Attributes	Displays the attributes for the document (option)
Version History	Shows the version history of the document.
Reviews	Shows ongoing and past reviews and approvals of the document
Comments	Shows the comments for the document.
Log	Show a log of all actions performed on the document
Permissions	Shows the permission settings for the document.
Lock/Unlock	Locks the document, preventing others from modifying or deleting the file.
Cut	Cuts the file to the clipboard.
Copy	Copies the file to the clipboard. (A copy of the document can then be pasted to this or another workspace.)
Copy URL to Clipboard	Copies the web address (URL) of the file to the clipboard. This link can be pasted into an e-mail instead of sending the document to other users.
Delete	Deletes the file.
Add to document basket	Place the document in a basket
Attach document…	Add a link to other documents.
Start Review...	Starts a new review of the document
Start Approval...	Starts a new approval of the document
Approve...	Approve a document without an approval workflow
Subscribe/ Unsubscribe	Receive an e-mail immediately when a document has been changed
Zip and Download	Creates a compressed file of the folder and its contents and lets the user download this file
Send in e-mail	Makes it possible to attach the file to an e-mail.

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Extract…	Option to extract files from a zip file (available for zip files only)

Edit on-line (available with the Webforum plugin for Internet Explorer or Firefox installed)

Edit on-line allows you to work with a document directly on the server without copying it to the local folder structure as long as your computer recognises the file format of your file.

During the time the document is edited, it is locked to other users. This is symbolized by the lock icon , preventing the file from being modified or deleted.

If you press save, or if the application asks you if you want to save changes when you close the application, and you answer yes, changes will automatically be saved. A temporary file created on your local computer when opening the document, will be automatically taken away when the document is closed. The lock on the file is also removed.

If you have chosen to switch on version control, changes will be saved to the next version number. There will be only one higher version, regardless of the number of times you pressed save.

Edit Online primarily works together with MS Office. Webforum does not test edit online with other programs.

Download –If you choose "Download…" a second dialogue box will appear, just as if you did not have the Webforum plugin. Please observe, changes will NOT be saved automatically to the document archive if you choose to open a document this way. The dialog look varies depending on your browser.

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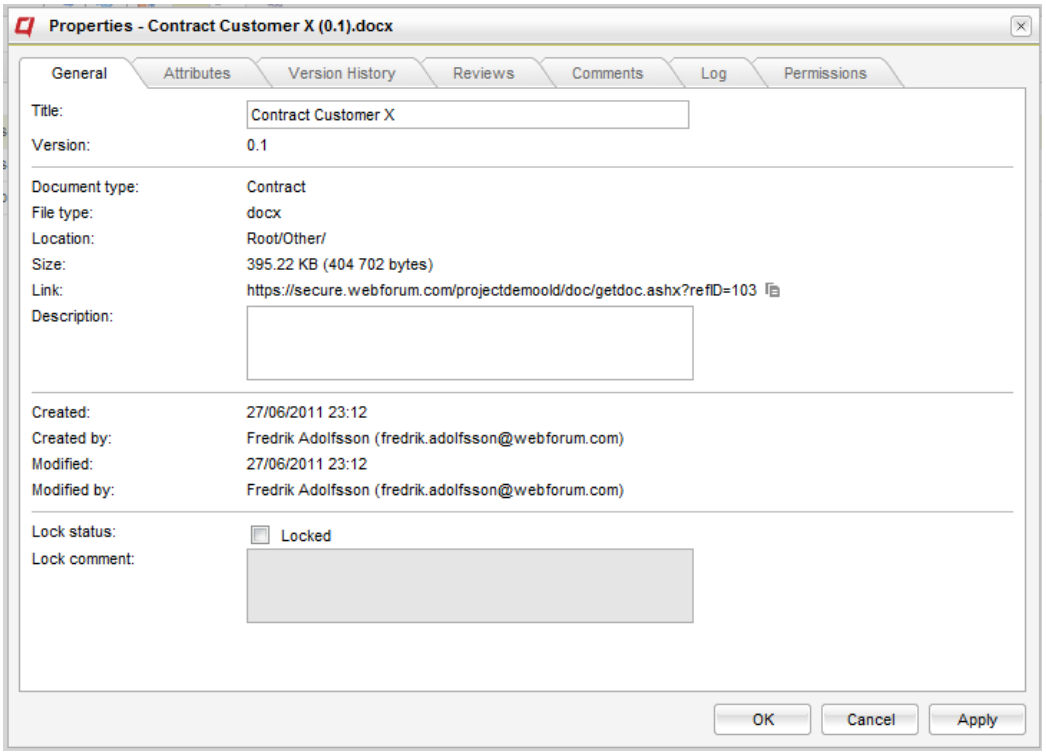
Properties

By clicking on Properties for a document, a window showing general information about the document is opened. It is possible to rename the document and provide a description. It is also possible to lock the document. The tabs Attributes, Version History, Reviews, Comments, Log and Permissions are also accessible depending on your workspace set up and your permission.



The General properties tab

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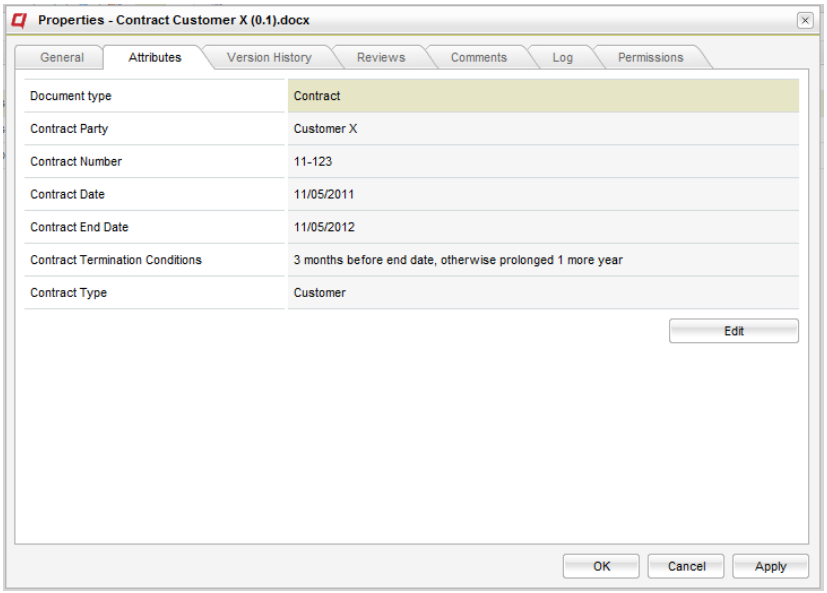
Attributes (professional)

The attribute tab is where you choose to classify a document as belonging to a certain document type. This is also where you set the corresponding attributes.

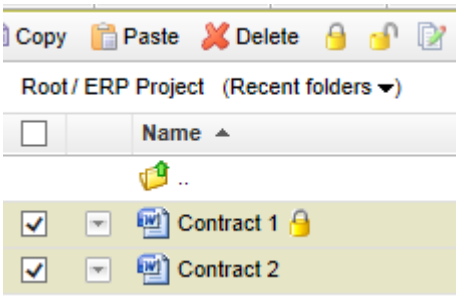


The attributes tab

Attributes that are URLs will be automatically clickable.

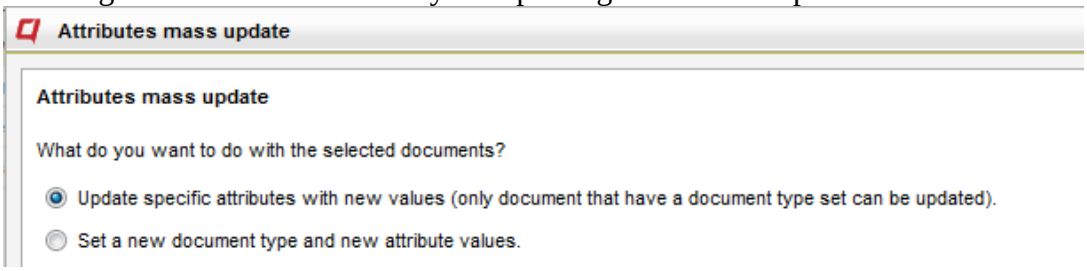
Attributes Mass update (professional)

It is possible to mass update attributes for many documents at the same time by marking documents in the document archive and press the icon in the toolbar.



Documents marked for mass update

A dialog with a choice of two ways of updating attributes is opened.


Attributes mass update
Attributes mass update
What do you want to do with the selected documents?
Update specific attributes with new values (only document that have a document type set can be updated).
Set a new document type and new attribute values.

Mass update

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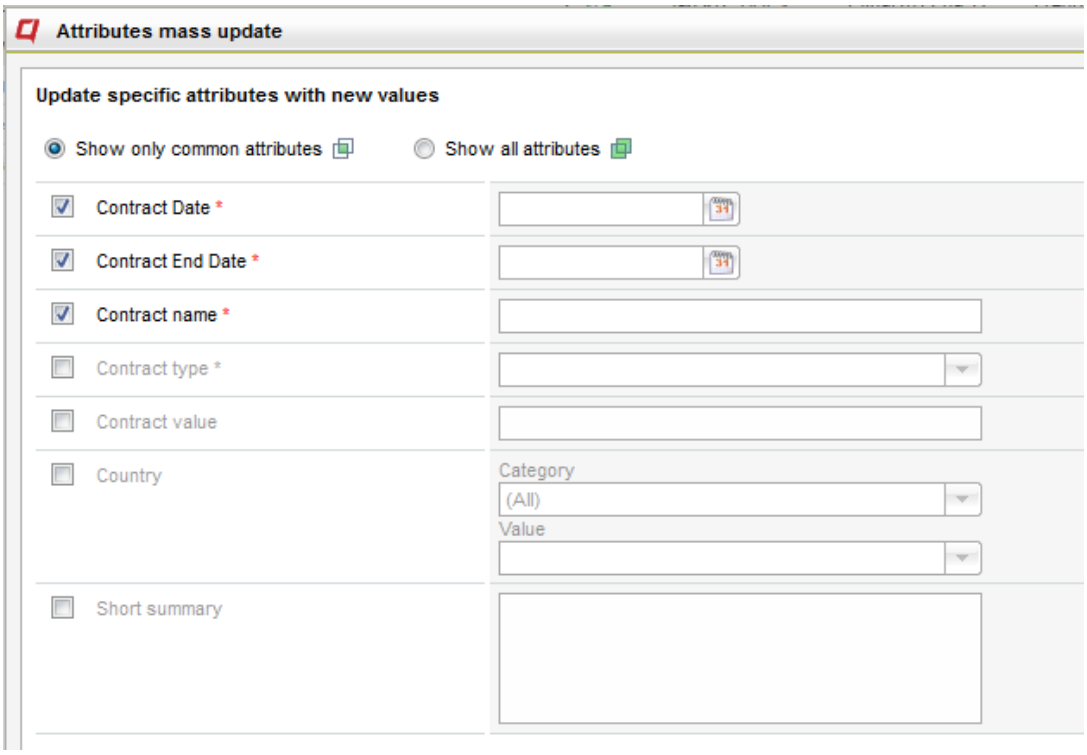
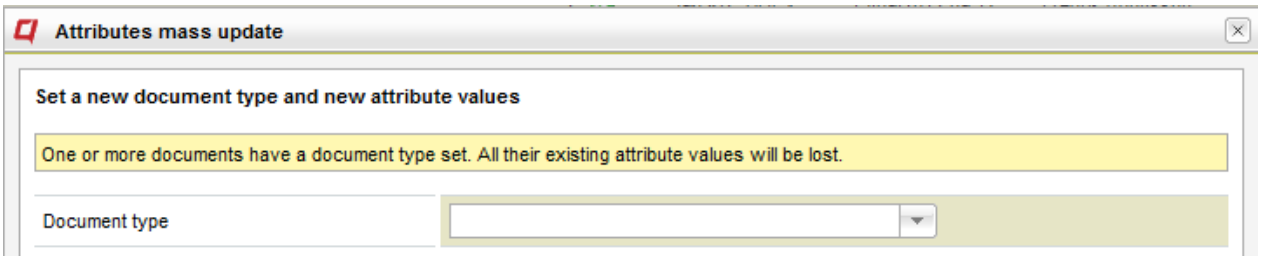
In order to update specific attributes, check the attributes to update in the list.



Mass update

If a checked attribute is left empty, the attribute will be empty after the update, even if it had values before.

If you choose to set up a new document type, you have a choice of document type first. If any of the selected documents already has a document type, there will be a warning message.


Attributes mass update
Set a new document type and new attribute values
One or more documents have a document type set. All their existing attribute values will be lost.
Document type

Mass update - new document type

If you choose a document type and click OK a normal attribute list will be shown.

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Version control

The version control feature makes it possible to store different versions of a document.
Version control can be set either for a specific document or for all documents stored in a folder. You can either work with major versions only (e.g. 1, 2, 3) or with both major and minor (draft) versions (e.g. 0.1, 0.2, 1.0, 2.0, 2.1).

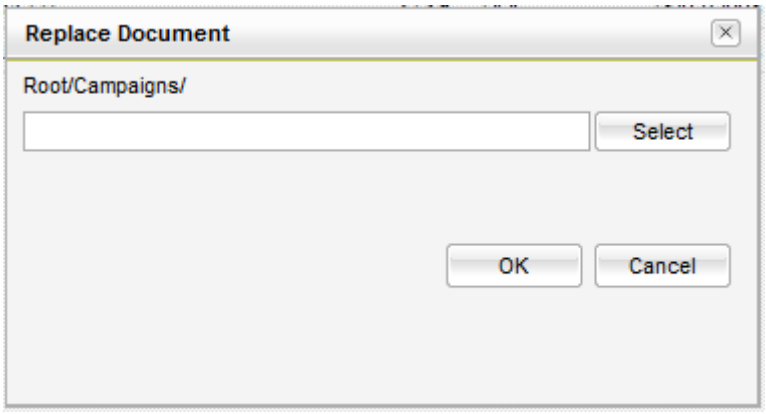
To activate version control for a document, click on Version History in the drop down menu and then select one of the version control options.

The file is now put under version control and a version number is shown in a separate version column. A click on version number will open version history.

When opening a file put under Version control in the Document Archive, it is always the latest version of the file that is opened.

Upload a new version

To upload a new version of a file, click on the dropdown menu and select “Replace”. Select the new version of the file from your computer or network by clicking on “Select”.



Upload a new version of a file.

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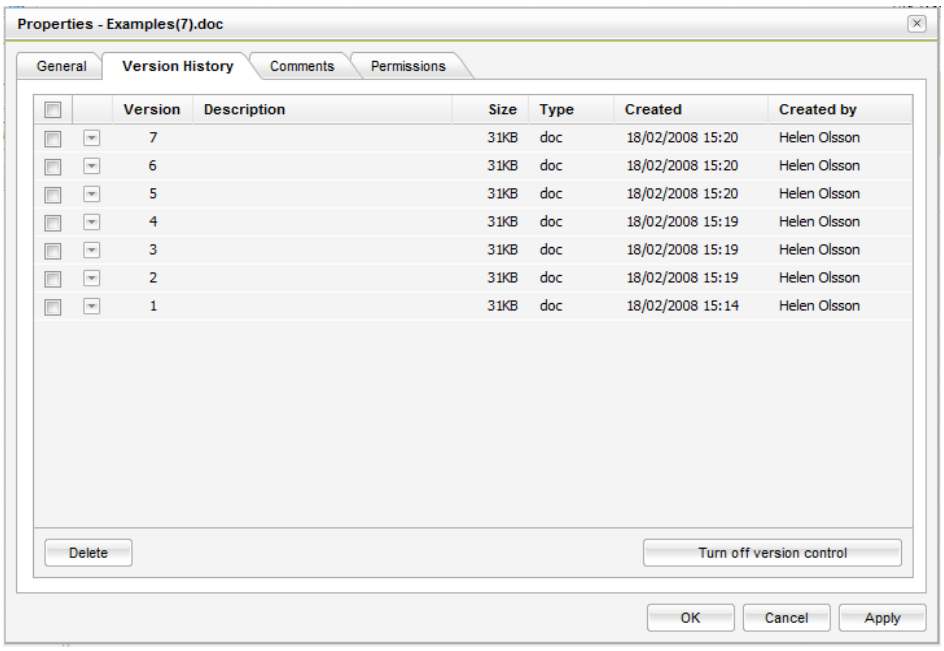
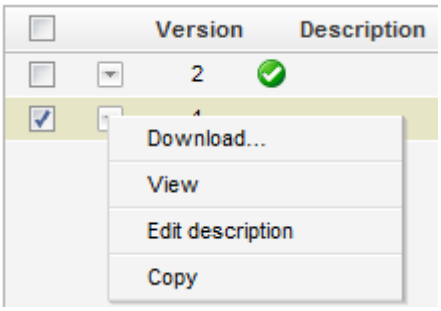
Version history

To view all versions of a file put under version control, click on its version number or use the document menu and select Version history.



Version history

To open/download a specific version from the version history, click on the pop-up icon and select “Download...”.



Version history context menu

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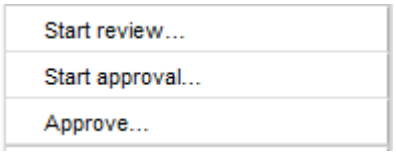
Review and Approval

Review and approval are two processes that are supported by the system.



A review or approval contains the following main steps:

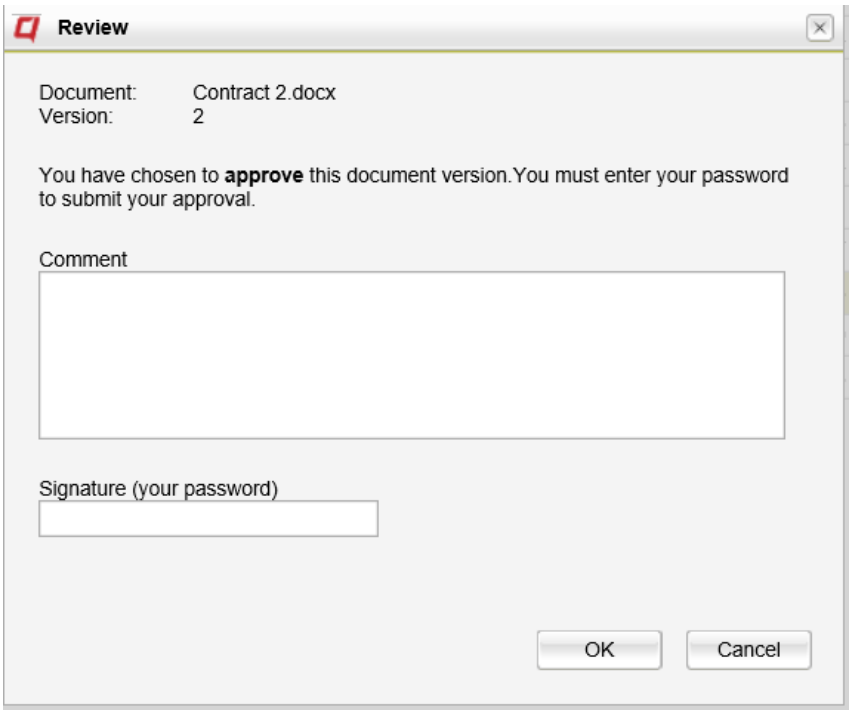
1. Start of review or approval.
2. E-mail notification to participants.
3. Participants respond to review or approval requests.
4. Review or approval is completed.

1. Start the review or approval

There are two ways to start a review.

- From *"Start Review ..."* in drop down menu for the current document.
- From the *"Start Review"* button in Reviews tab (tab is reached most easily via the *"Reviews"* menu item for the current document).

If you want to start an approval process, the corresponding menu item or button is "Start approval". You can also approve a document without a process by clicking "Approve…"



Approval without workflow

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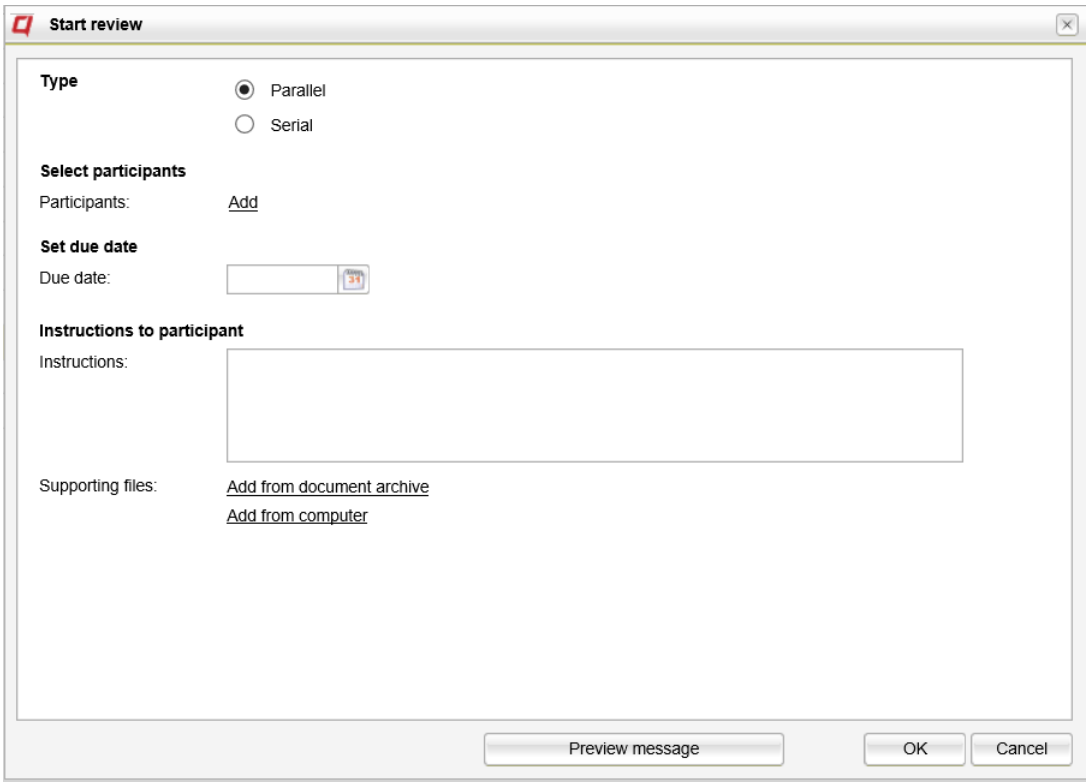
When starting a review (or approval) workflow, the following choices have to be considered:

- Select a **parallel or serial workflow**. In a parallel workflow, the participants will be asked to review/approve all at the same time. In a serial workflow, the first person on the list will be asked to review/approve first and the second one only once the first one has completed his review or approval.
- Specify if it should be allowed to **update** the document during the review (this is not possible for approvals).
- Select **participants** to review/approve the document. A reviewer must be a user with permissions to at least read the current document. All reviewers will receive automatic e-mail notification (click on the "Preview message" button to see how e-mail notification will look like).
- Specify a **due date** when the review should be completed. A participant can always respond even if the date has passed.
- Enter **instructions** to the reviewers, and add supporting files if necessary (from workspace document archive or from your own computer/network).



Start review workflow dialog

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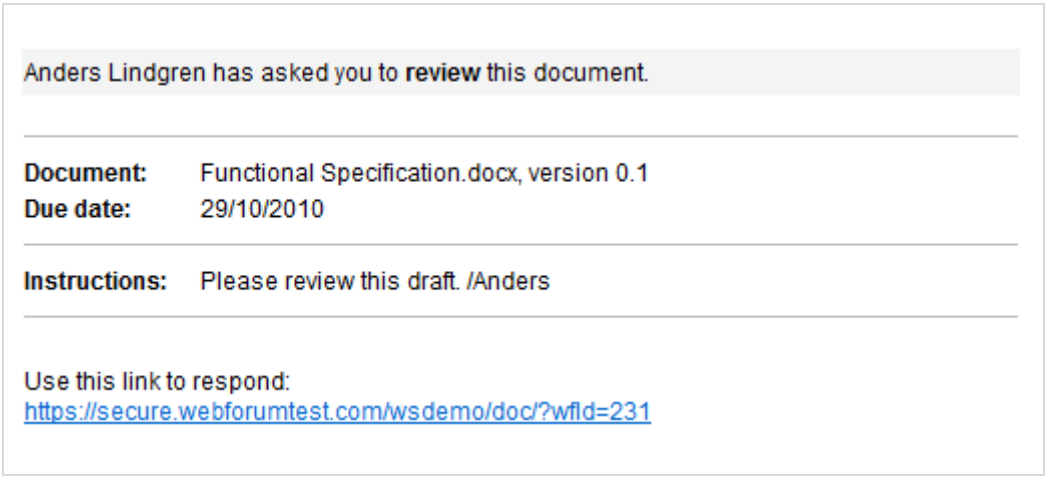
2. Notification email to participants

All participants in the review or approval will get a notification e-mail asking them to review or approve (or reject) the document.


Anders Lindgren has asked you to **review** this document.

Document: Functional Specification.docx, version 0.1
Due date: 29/10/2010

Instructions: Please review this draft. /Anders

Use this link to respond:
https://secure.webforumtest.com/wsdemo/doc/?wfId=231

Example of notification e-mail to participant

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3. Participants respond to review or approval requests.

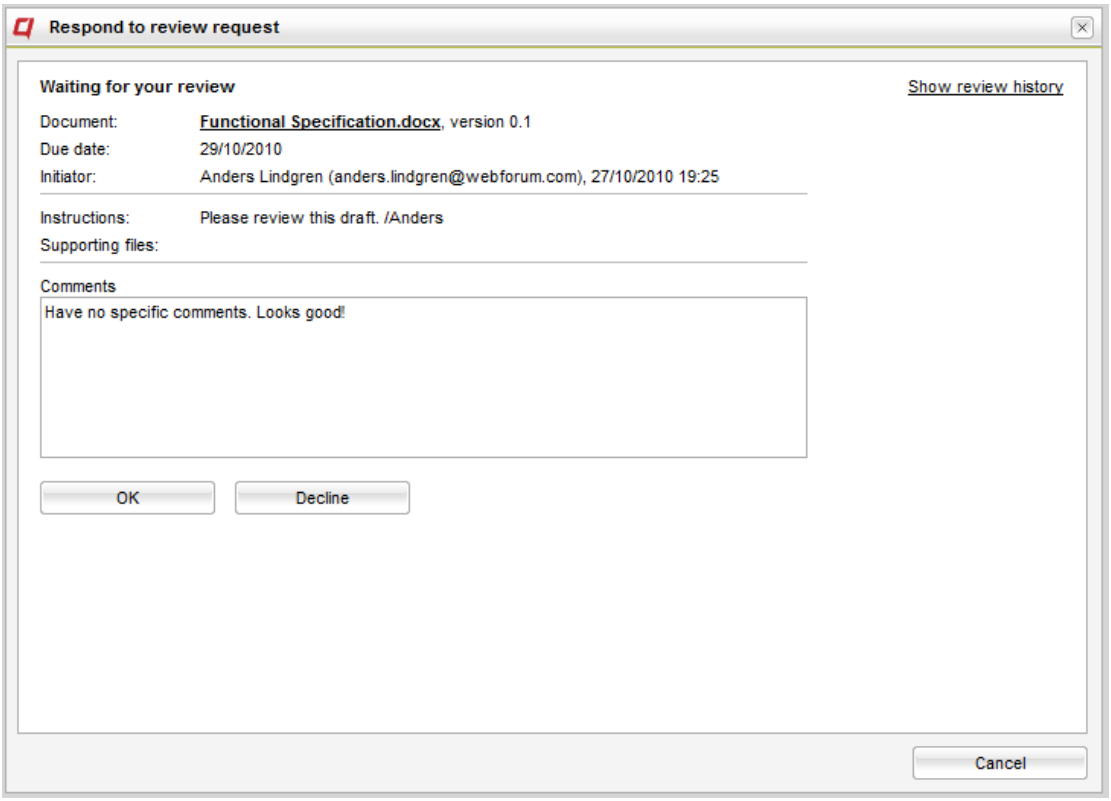
By using the link in the notification e-mail, the user will be redirected into the current workspace. If you are not already logged in, login will be requested.

A dialog window opens automatically, and from which you can open the current document to review/approve. From the Review history link you get information about other participant's responses and also get information about previous reviews.

It is also in this dialog the participant enter review comments.

The same dialog can also be accessed via the menu item "Review…" or "Accept/reject…" for the current document.

Please note that the approving or rejecting a document will require a password to be entered.



Exemple where a participant is entering review comments

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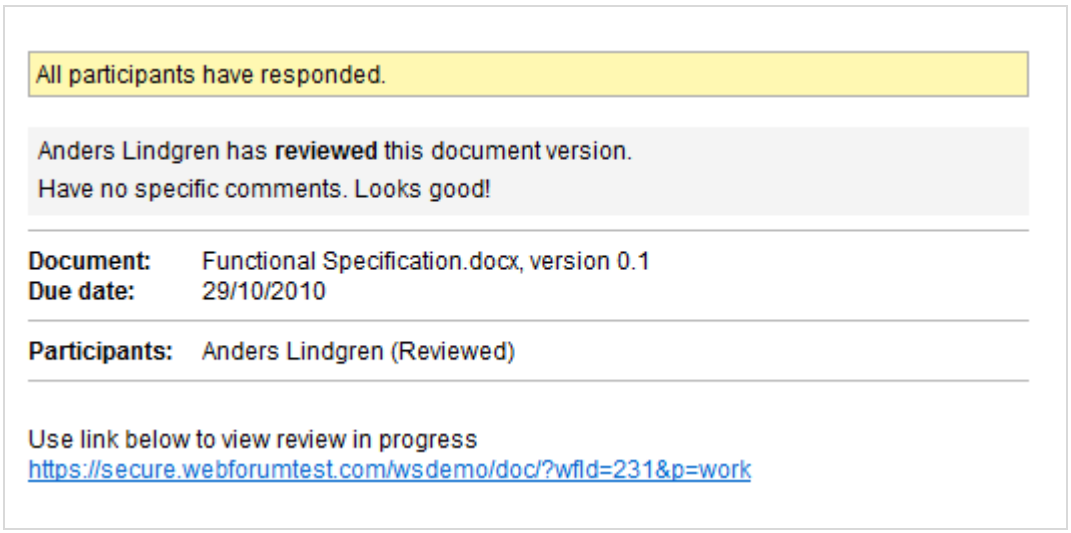
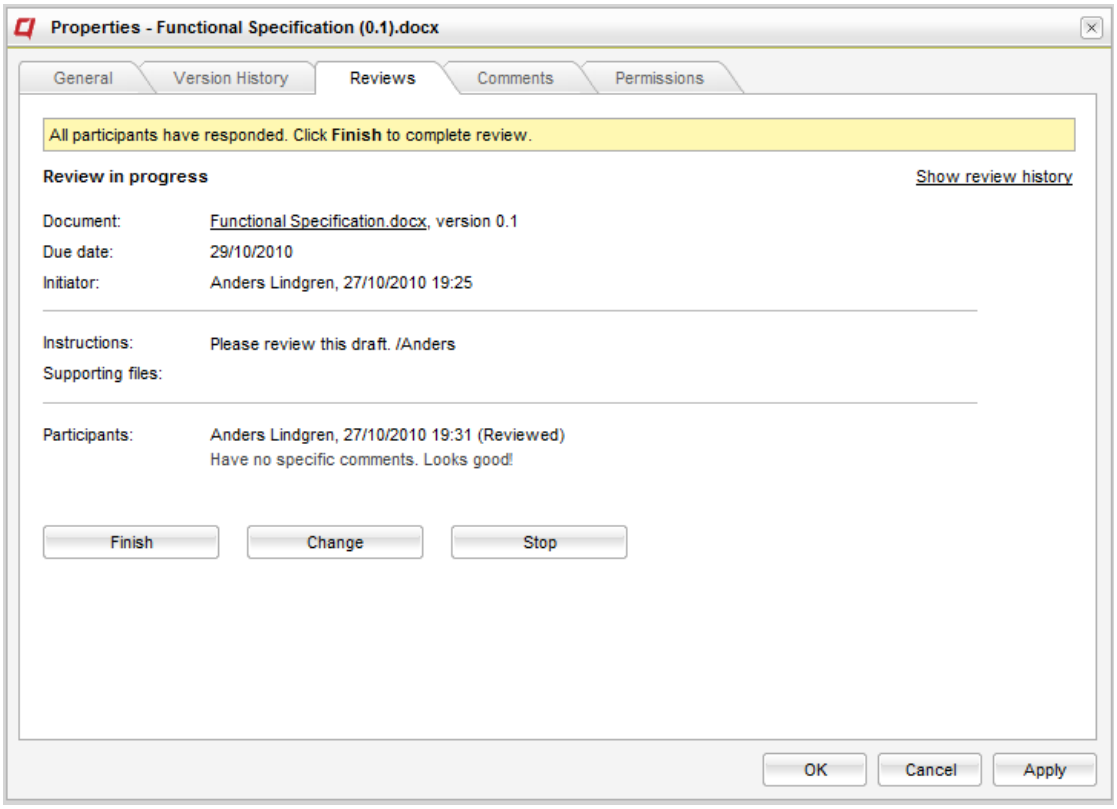
4. Review and approval completion

The initiator of a review (or approval) will receive a notification e-mail whenever a participant is responding.


All participants have responded.
Anders Lindgren has **reviewed** this document version.
Have no specific comments. Looks good!
Document: Functional Specification.docx, version 0.1
Due date: 29/10/2010
Participants: Anders Lindgren (Reviewed)
Use link below to view review in progress
https://secure.webforumtest.com/wsdemo/doc/?wfId=231&p=work

Example of notification e-mail to initiator

By using the link in the email or by accessing the Reviews tab directly from within the document archive, the status of the ongoing review or approval is shown.



Example of Reviews tab and an ongoing review

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- **Finish**
  Click the button *"Finish"* completes an ongoing review (or approval).

  When a document is getting approved its status will be Approved. If the approved version is a minor version eg 1.3 the version number will be changed to next major version number, in the example 2.0. Otherwise, version number will remain.

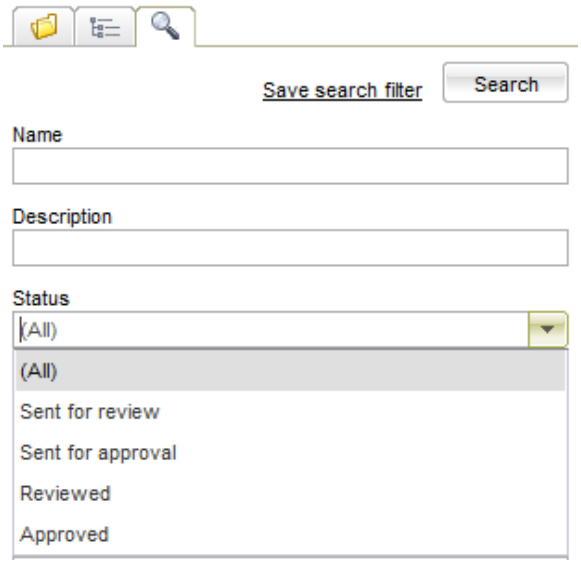
- **Change**
  During an ongoing review (or approval) changes to it can be done. For example it is possible to add participants, change due date and manage instructions).

  Click the button *"Change"* to change the ongoing review (or approval).

- **Stop**
  An ongoing review can always be cancelled.

  Click the button *"Stop"* to cancel the ongoing review (or approval).

It is easy to find documents in workflow, just use the status field in the advanced search.



Search on status

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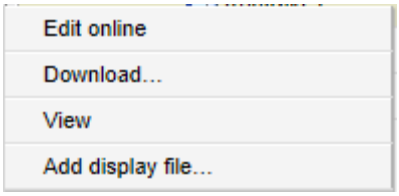
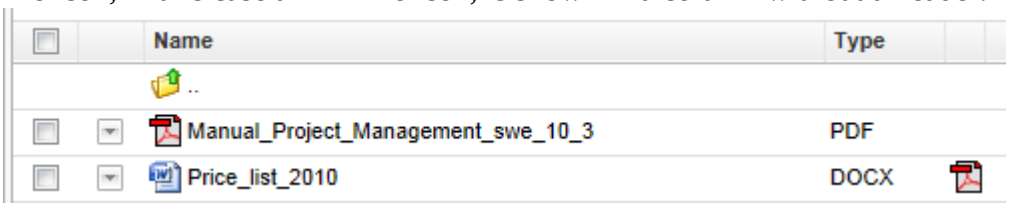
Display files (Professional)

A display file is an additional file added to a document. This means that a word file, for instance, can have a PDF version as well. A display file is added from the document context menu by choosing the “Add display file” alternative.



When you open/download or view a file, you will be asked if you want the original file or the display file.

You can also click the display file icon in order to open the display file. The display file icon, in this case a PDF file icon, is shown in a column without a header.



Display file icon

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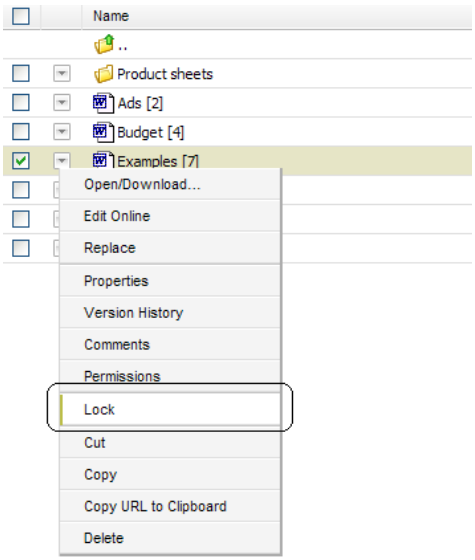
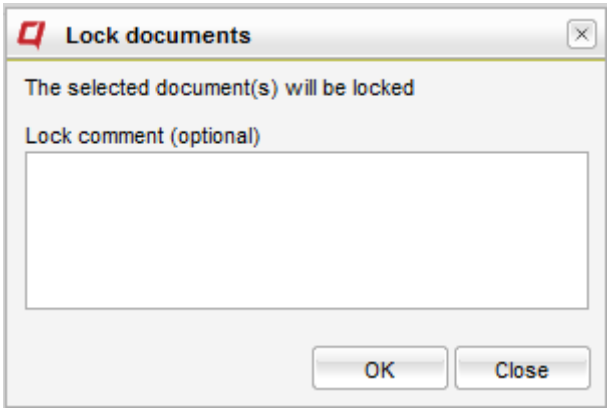
Locking

To prevent a file from being modified while working on it, it is possible to lock it. When a file is locked, other users can download the file, but they cannot upload or replace it unless they have administration rights. To lock a file, click on the pop-up icon and click “Lock”.



Lock a document

You get an option to add a lock comment.



Lock comment

Lock comments can be viewed in the General Properties tab of the document

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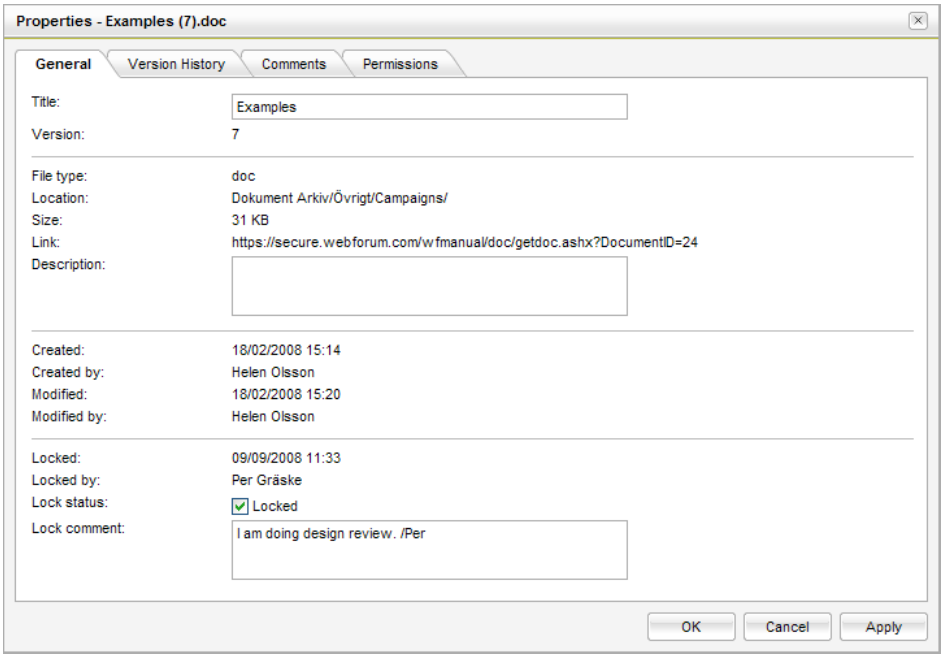
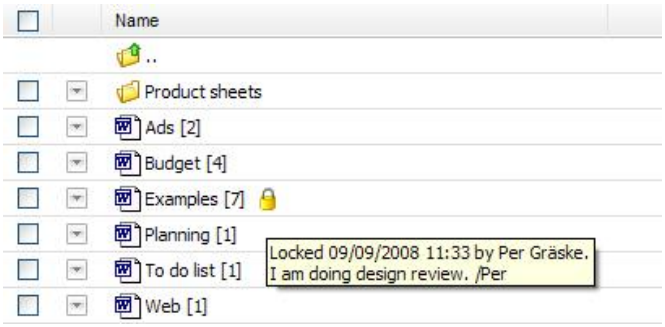


General Properties

In the folder view, a lock icon is displayed next to the file name.



Example of a locked file with tool tip displayed.

When doing mouse over the locked file icon a tool tip is displayed. The tool tip includes the timestamp (when the document was locked), locked by, and the lock comment for the document.

The file can only be unlocked by the person who has locked the document and administrators. To unlock a file, click on the Dropdown menu and select “Unlock”.

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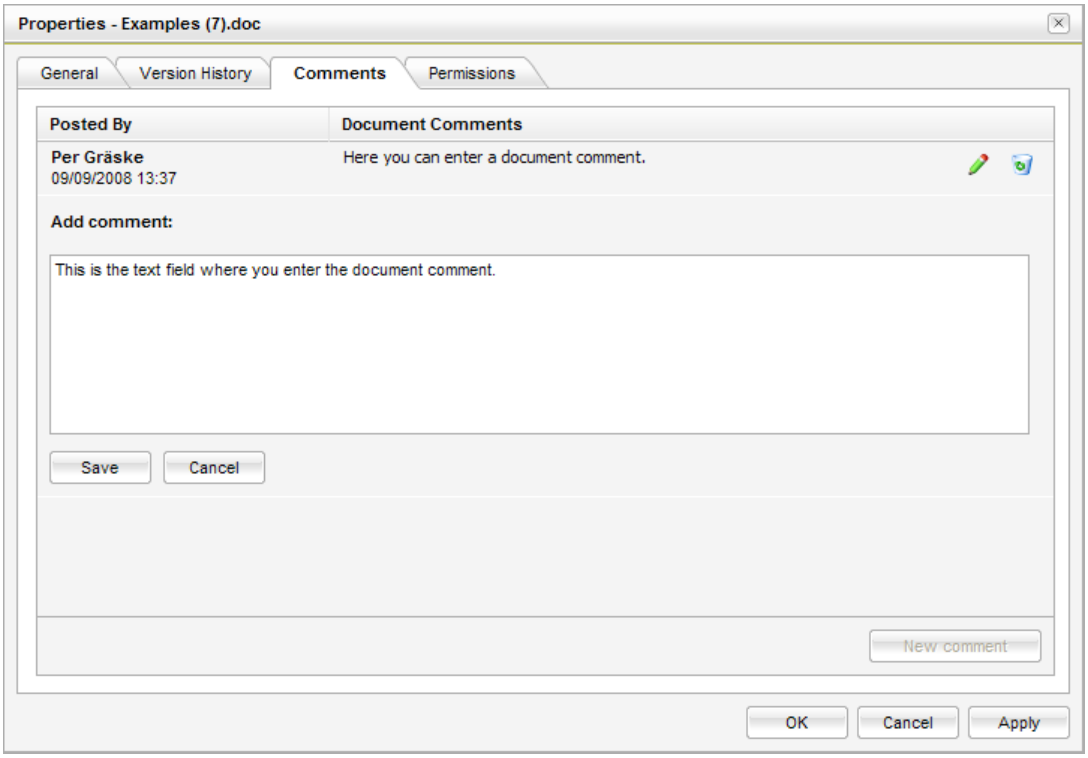
Comment on a Document

To the right of each file, a Balloon icon is displayed. This option allows users to comment on – or discuss - the contents of a document. By clicking on the balloon icon, and then on *New comment*, a blank comment form is displayed. Enter the comment into the text box. Click *Save* to post the comment.



Commenting on a document.

The number of comments posted for a document is shown next to the balloon.

Document Alias (linked documents)

A document alias is a document residing in one folder that you want to display in another folder as well. A document alias has a symbol next to it in all folders where it is displayed, except for the original folder. In order to create a document alias in a folder, simply copy the document and paste it as an alias using the target folder context menu (right click on the folder in the left pane).

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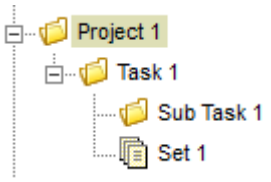
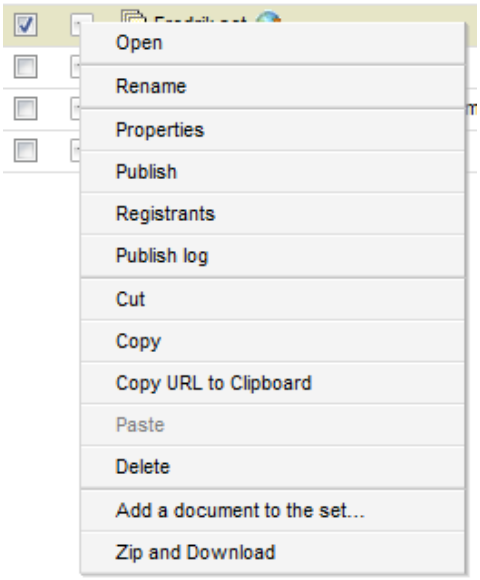
Document Sets (Professional)

A Document Set is a set of documents with specific versions. You create a set in a folder by clicking “New Document Set” in the folder context menu (right click). Sets are displayed in the folder hierarchy.



Document sets in the folder tree

In order to place a document in a set you open the set context menu and choose “Add a document to the set” or use copy and paste. The specific version of the copied document will be stored in the set as a link, i.e. no real copy will be taken.



Set context menu

If the document is updated, the set will still display the old version, but there will be an exclamation mark next to it indicating that a newer version exists.

Set information

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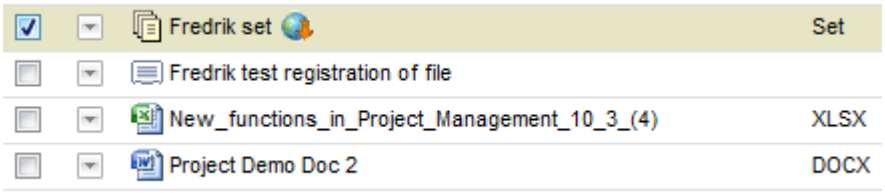
Publish Document Sets (Professional)

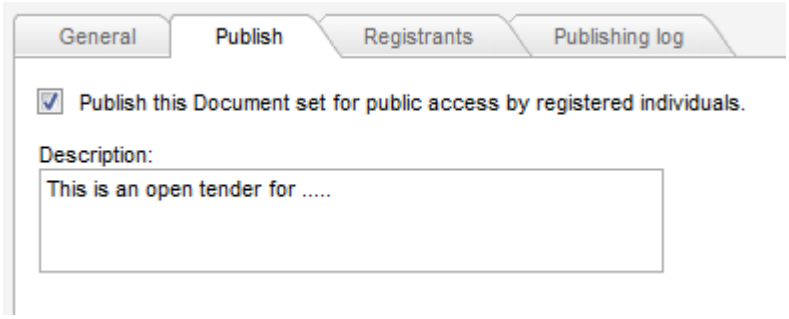
A document set can be published. This is done by selecting “Publish” in the drop down menu for a set.

A published set has a globe symbol next to it.



A published set

It is possible to add a text on the Publish tab for a document set.



Published Set Comments

The Registrants tab contains a registration URL than can be copied and sent to persons using e-mail (i.e. not from this tab). It also contains a list of all persons that have registered using the registration URL sent to them.

Checking the “Send Download URL automatically” checkbox means that new registrants will automatically get a mail with a link to the download function. Otherwise the “Send notification” function must be used in order to send links to the download window.

Registrants

When a registrant clicks on the registration URL, she will come to the registration form.

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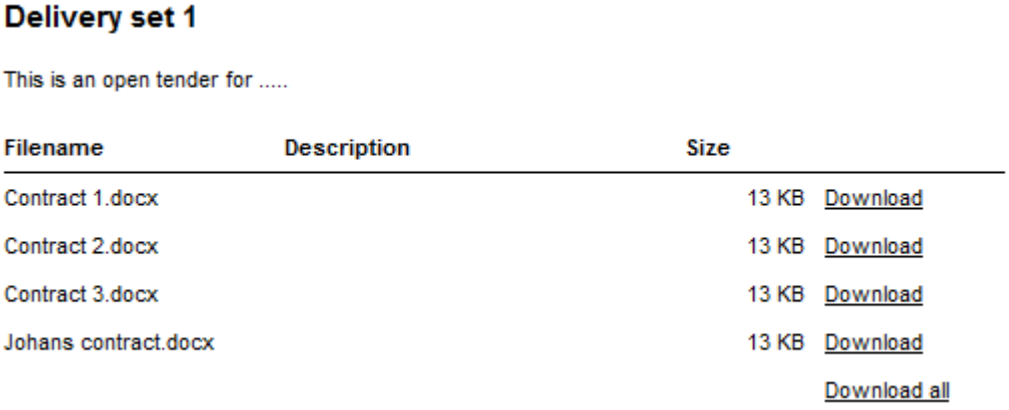
Registration form

After the registration, a link to the download area will be sent to the e-mail address provided:

From: Demo 11.4 <noreply@webforum.com>
To: Fredrik Adolfsson
Cc:
Subject: Your download URL (Delivery set 1)
This is an automatic confirmation of your registration. Down below you will find the URL to use for access to all files.
https://secure.webforumtest.com/demo114/doc/public/Download.aspx?key=38da41b5-2a30-453a-96f8-7ce8f538c5fe

Clicking on the link takes the registrant to the download page from which the files in the set can be downloaded.



Download area

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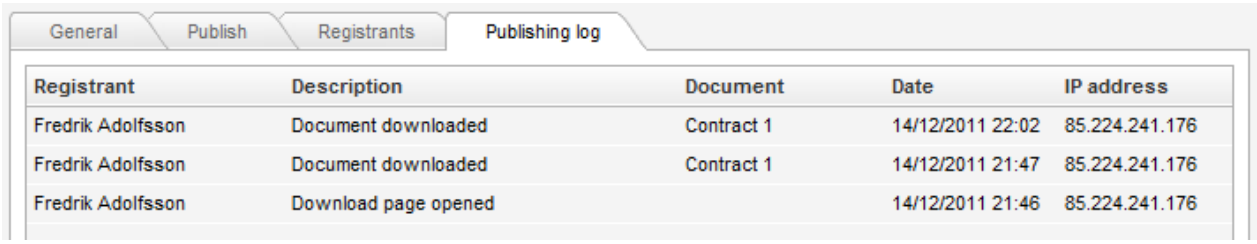
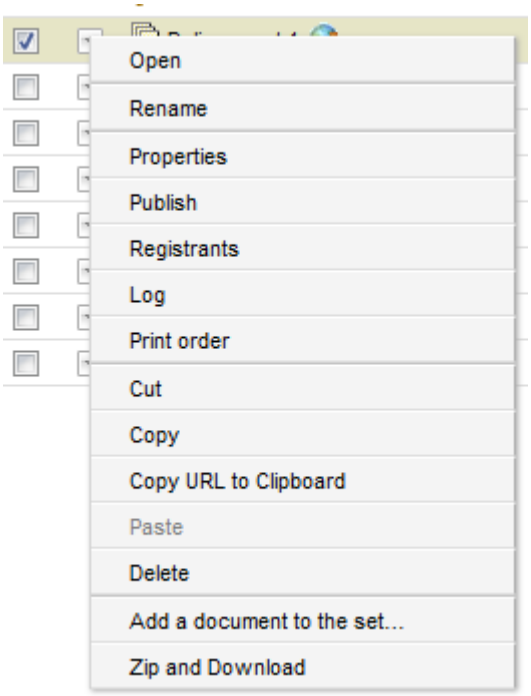
When a person opens the download page or downloads a document, it will be shown in the Publishing log.



Publishing log

Print orders (Professional)

A set can be sent for printing. A print order is added to a set by clicking “Print order” in the context menu for the set.



Set context menu

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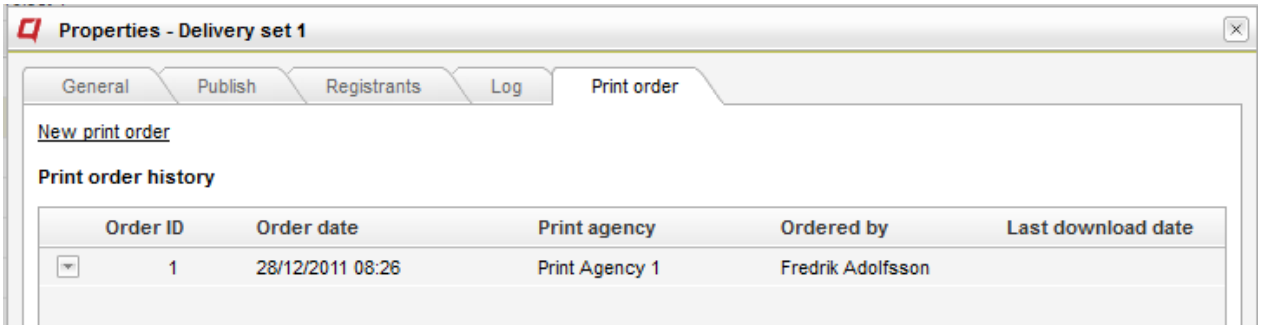
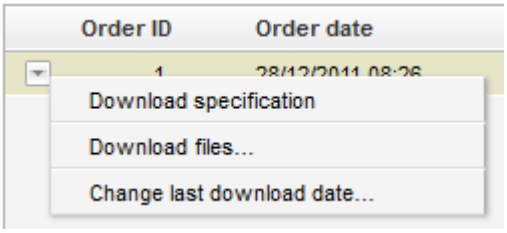
In the print order dialog you can add new print orders by clicking “New print order”.



Print order tab

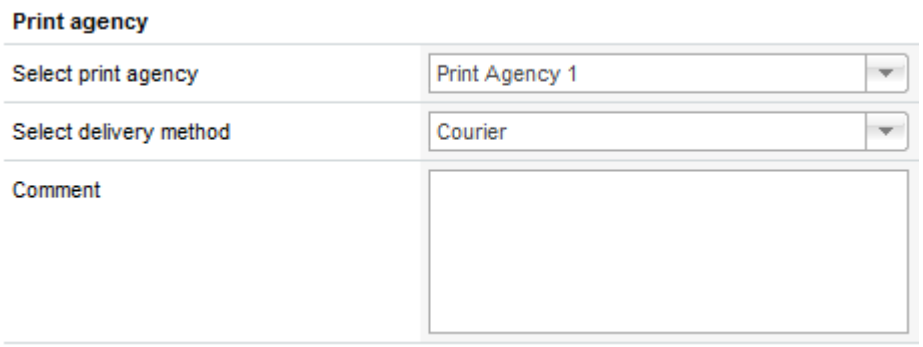
You can also take a look at an existing print order through the context menu for a print order.



Print order context menu

Adding a print order

There are a number of fields for adding new print orders:



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Order information

First Name *	Fredrik
Last Name *	Adolfsson
Company *	Webforum
Address Line 1 *	
Address Line 2	
Postal Code *	
City *	
Phone *	
E-mail Address *	fredrik.adolfsson@webforum.com

Invoice information [Copy from Order information]

First Name *	
Last Name *	
Company *	
Address Line 1 *	
Address Line 2	
Postal Code *	
City *	
Phone *	
E-mail Address *	

Delivery information [Copy from Order information]

First Name *	
Last Name *	
Company *	
Address Line 1 *	
Address Line 2	
Postal Code *	
City *	
Phone *	
E-mail Address *	

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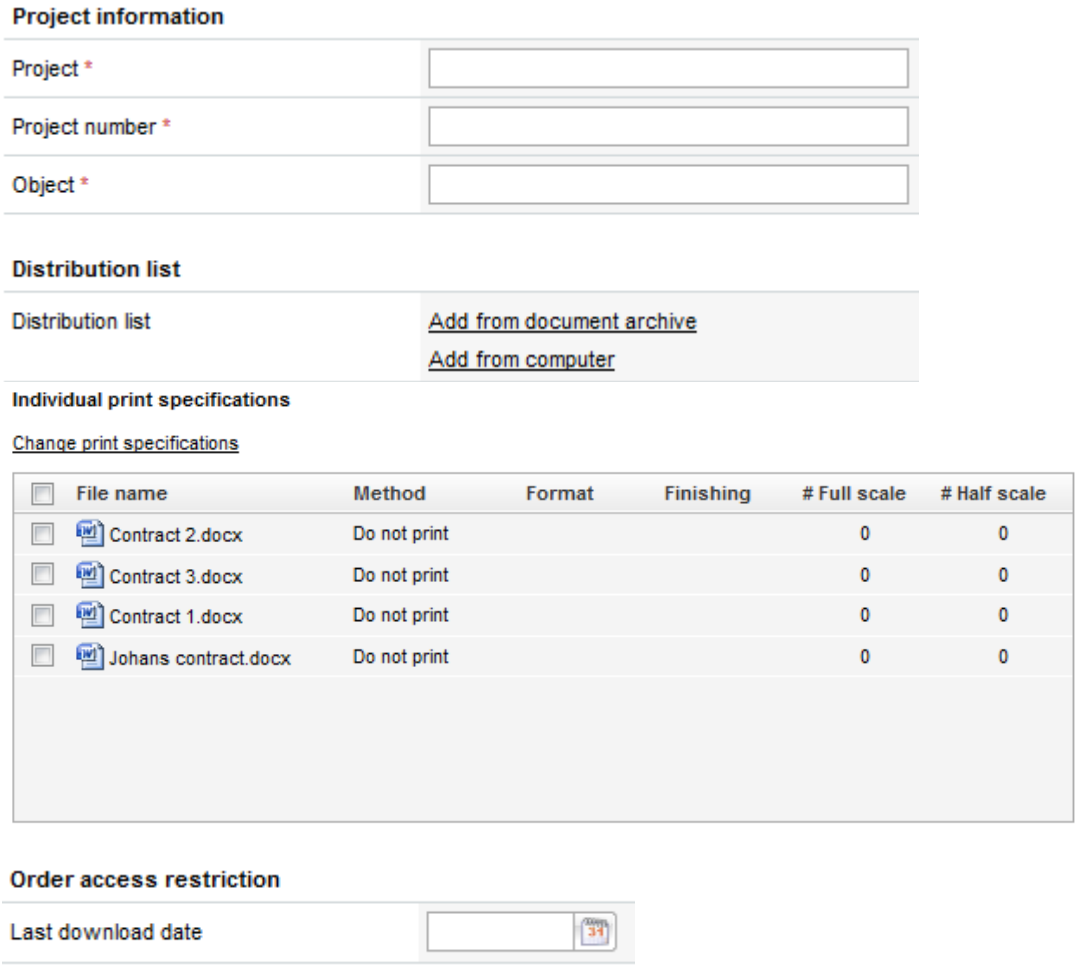

Print order form fields

The order information will use information from your user as default values. Most fields are self-explanatory, but the following require additional explanations:

Print Agency – this field is connected to the print agency list set up in the document configuration. A print order will be sent to the e-mail address of the print agency. The e-mail will contain a link to a download area, see more information below.

Distribution list – One distribution list can be added to the order either from the workspace or your local computer. There is no format check on th distribution list.

Change print specification – Select the documents from the set that you want to set a print specification for by marking them in the list. Then click “Change print specification”. This will open up the Edit print specification pop-up window.

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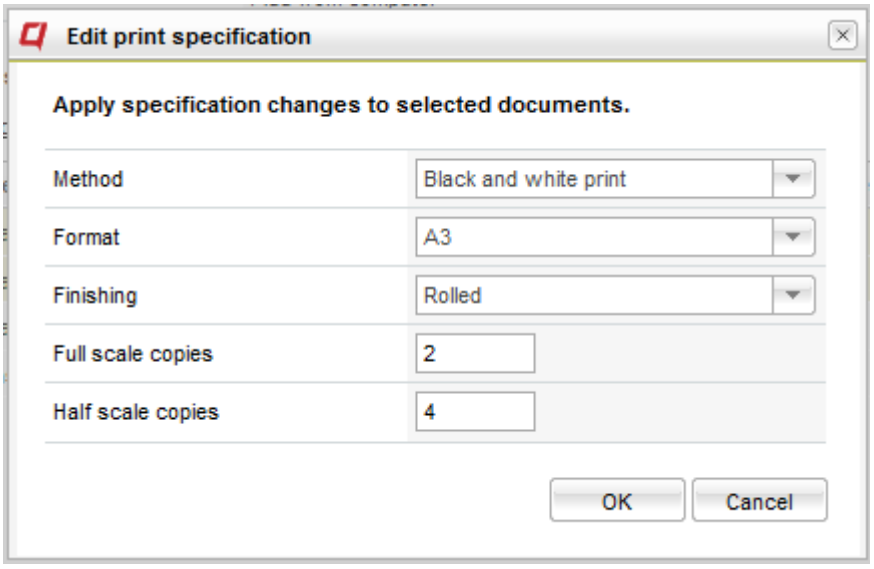
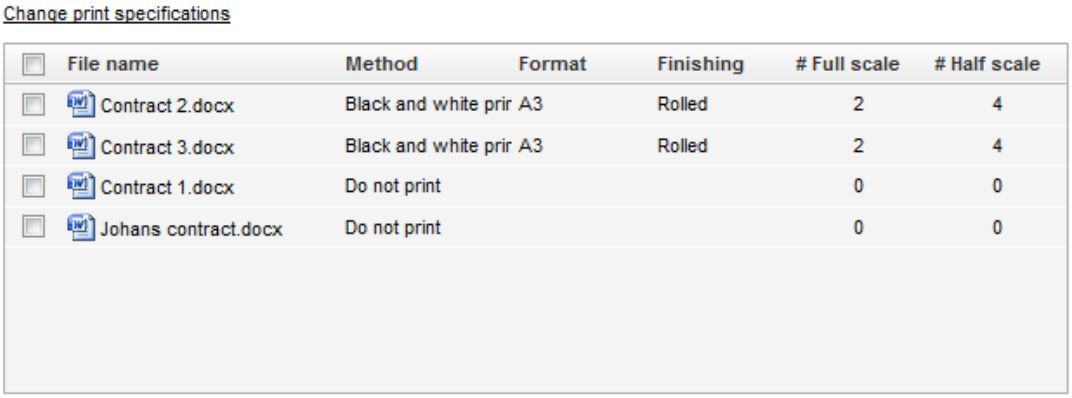


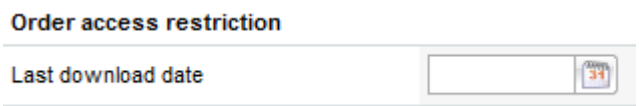
Edit print specification

Here you can choose how you want the documents printed. Press "OK" when ready. The new choices will appear in the list.



Print specifications

Order access restrictions – It is possible to set a date-based access restriction on orders. By doing this you prevent print agencies from being able to access print orders forever. This date can be changed later if needed.



Order access restrictions

When ready, press "Send order" and the order will be sent.

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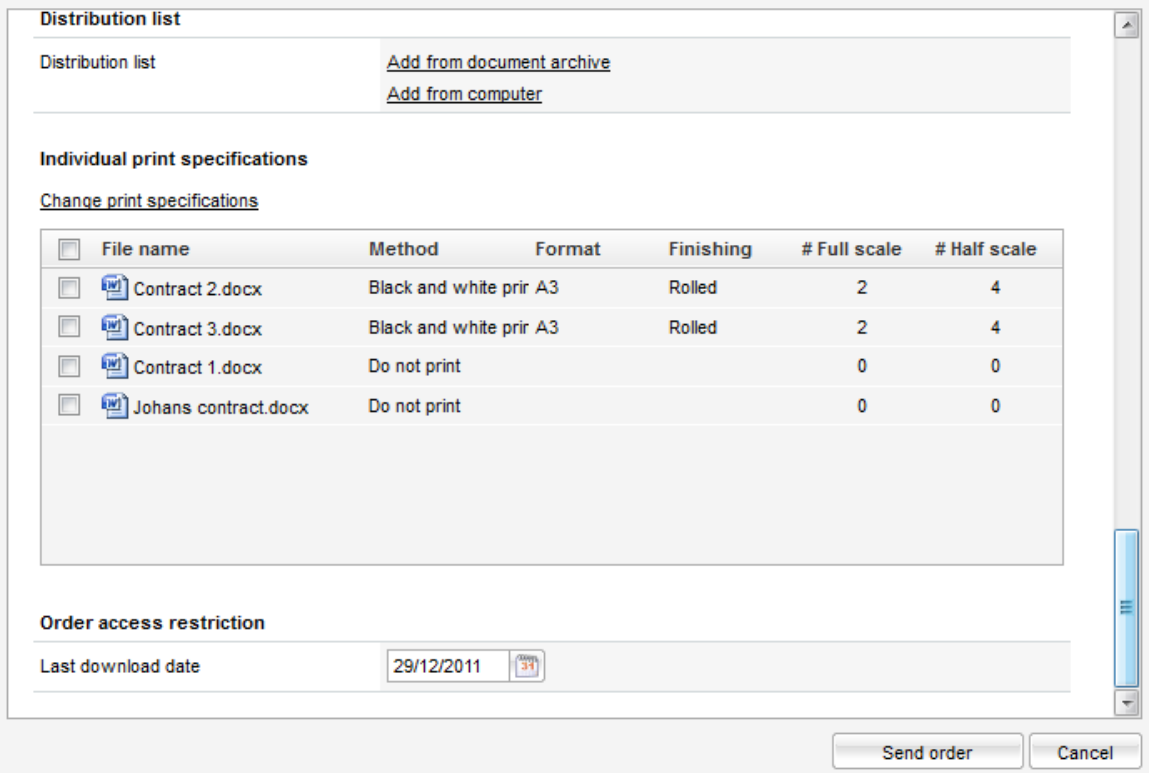
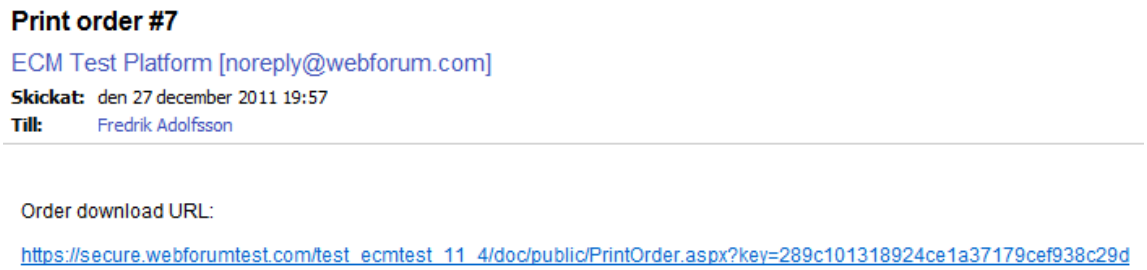


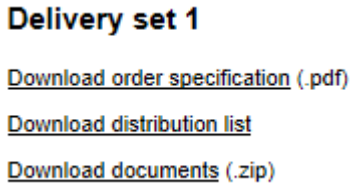
Send order

The print agency will receive an e-mail with a link to the download area:



Print order e-mail

Clicking on the URL will take you to the download area. Here it is possible to download the print order specification, the distribution list and the documents to be printed.



Print order download area

The log for a set contains information about print order downloads.

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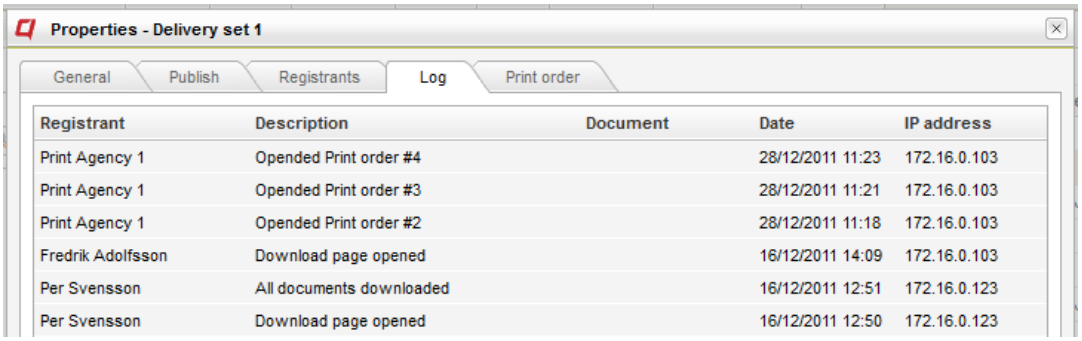

Set log

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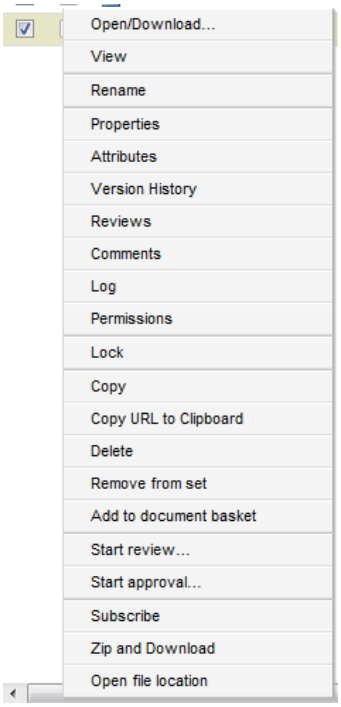
Document baskets/favorites (Professional)

A Document Basket is a container for documents that you want to access in one place, even if the originals are stored in various folders.



In order to create a new basket or add a document to a basket, click the "Add to document basket" symbol on a document context menu (right click).

You can also copy and paste documets to an existing basket.

Baskets are displayed as a separate node in the folder hierarchy.

Document baskets have a node in the document archive tree. Click on a basket to see all documents placed in the basket.

Baskets in the folder tree

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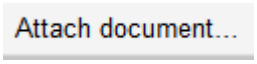
Document attachments (Professional)

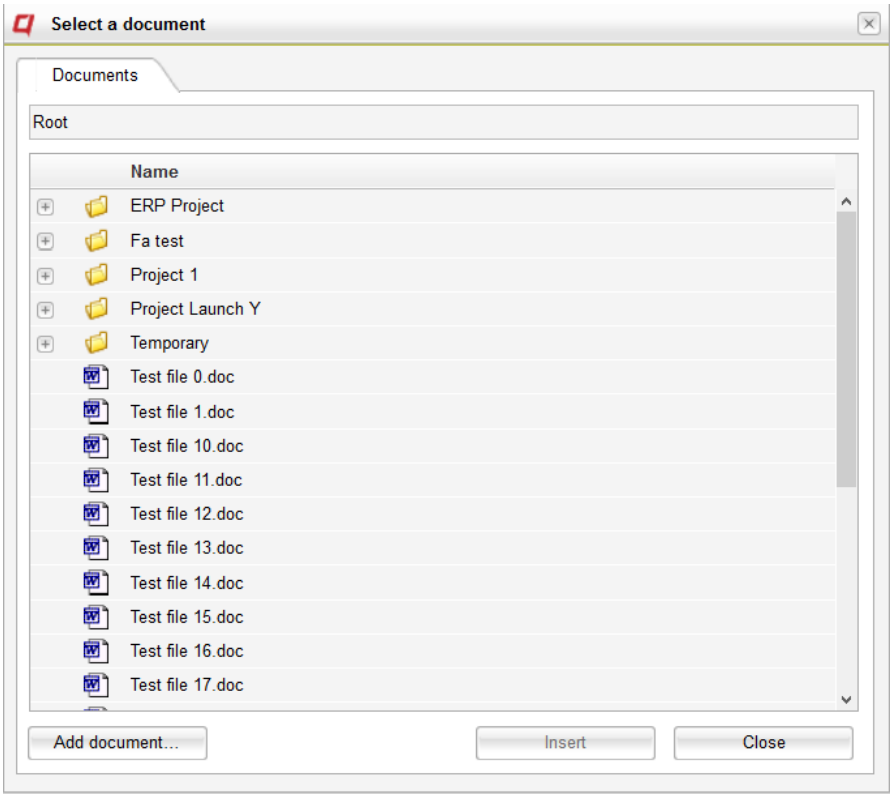
It is now possible to link documents in the document archive to another document as attachments.

From the context menu for the main document, choose “Attach document…”



Attach document

The “Select document” dialog is opened and you can select a document to attach.



Select document

There will be a chain link symbol next to the document indicating that the document is linked to another document.

Document link

The link will be the same for both the main document and the attached document. Clicking the link symbol will show both attached documents and documents that the document is attached to.

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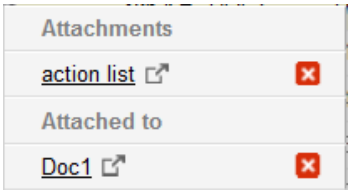
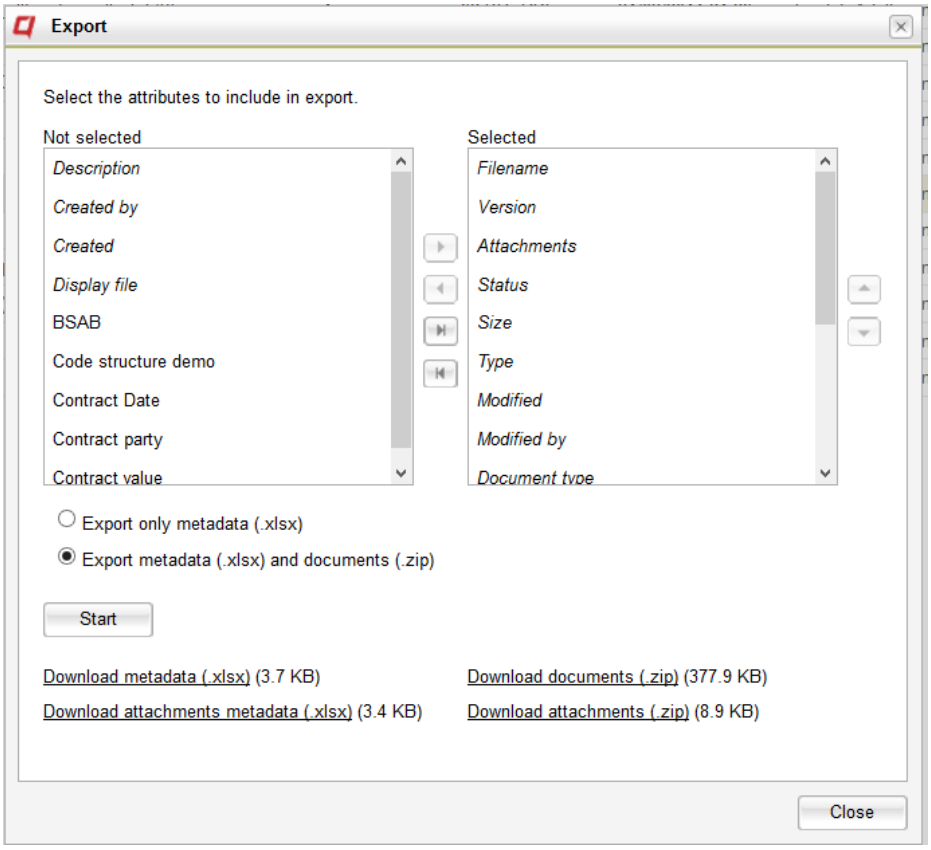


Attachments

It is possible to open the attchments by clicking on the document name or navigate to the attachments by clicking the navigation link symbol.

When exporting documents with attachments, there will be one additional file for document attachment metadata and one extra zip file for attachments.



Exporting files with attachments

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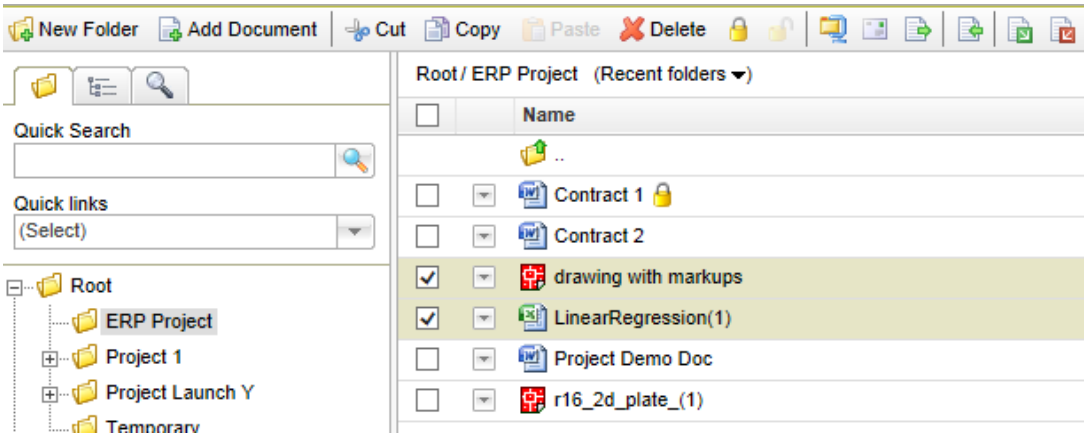
Loans (lend/return documents) (Professional)

The lend/return documents function makes it possible to keep control of where documents are being managed when they are not managed in the workspace. A typical example would be that a house owner who wants construction work done to a part of a building “lends out” the documents to the project which is performing the work. This could be a Webforum project on a different workspace or a project run by an entrepreneur outside of Webforum.

The lending function is normally switched off, so contact Webforum or a reseller to switch it on.

In order to lend out a document, mark the documents and click on the “lend out” icon in the toolbar.



Lending out

This opens the “New loan” dialog where data about the lent out documents can be entered.

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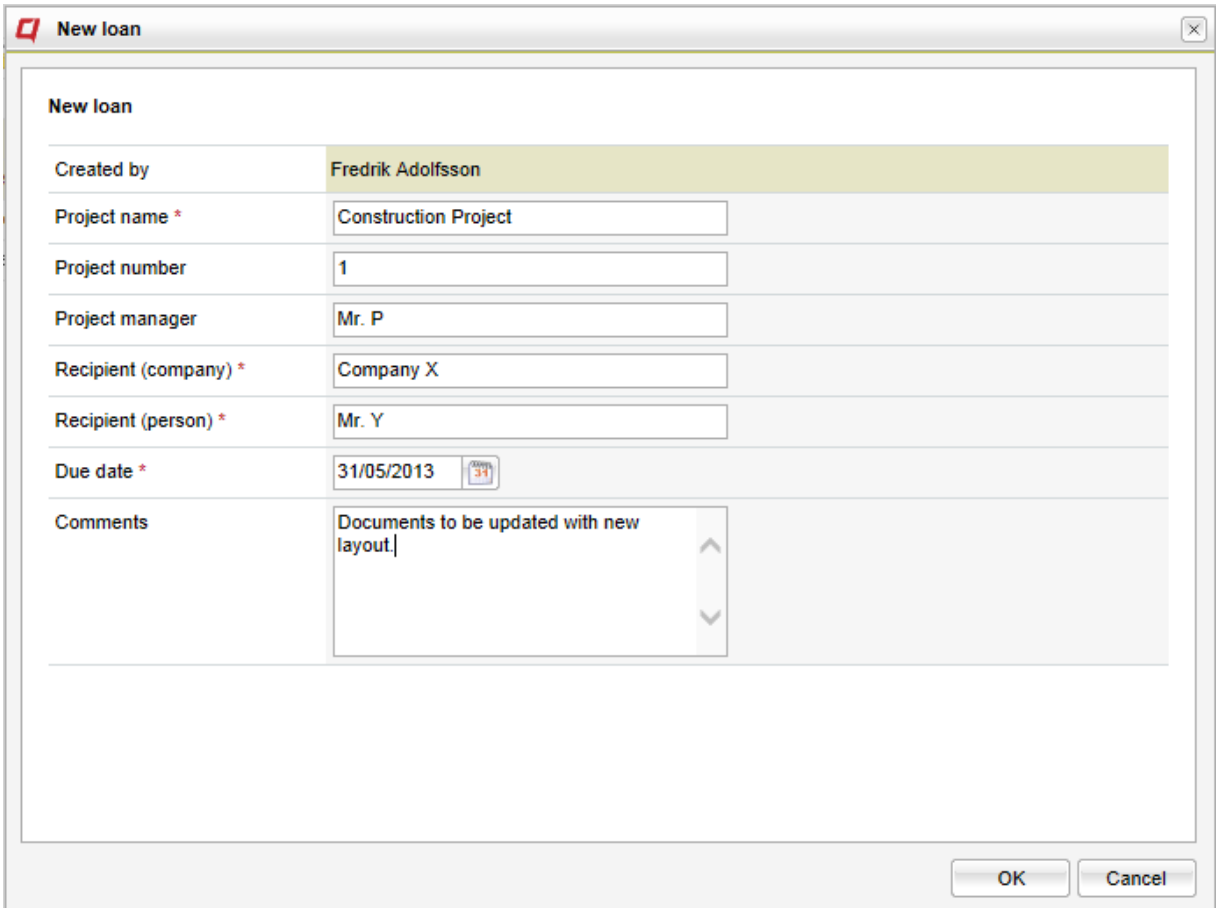
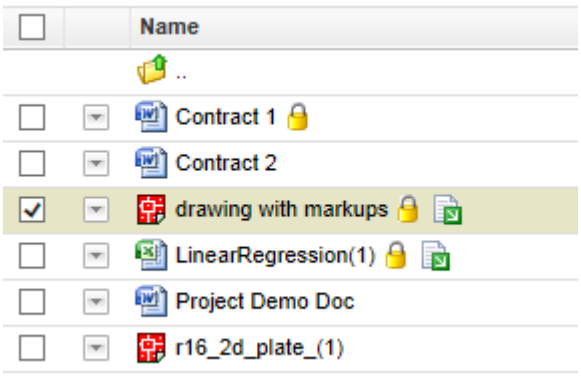


Data about lent out documents

The documents will then be marked as “lent out”



Lent out documents

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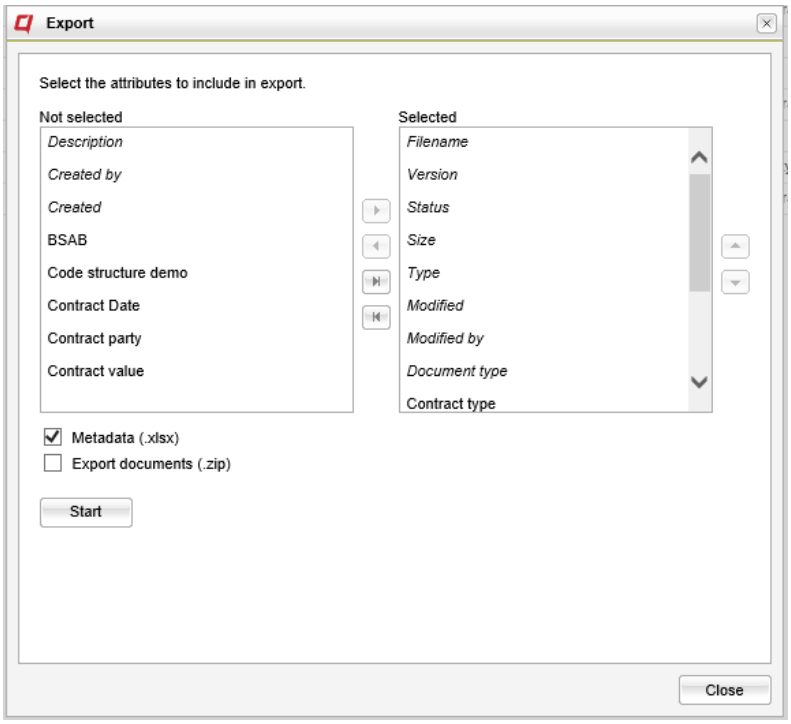
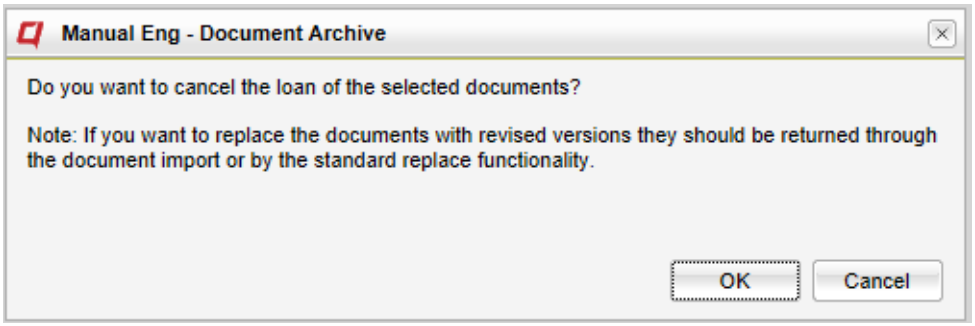
When lending out documents, you will automatically be given a choice to download them as well. The option is the same as an ordinary export.



Export after lending out documents

Click on the "Cancel loan" symbol to return a lent out document if it has not been edited. A warning text will be displayed:


Manual Eng - Document Archive
Do you want to cancel the loan of the selected documents?
Note: If you want to replace the documents with revised versions they should be returned through the document import or by the standard replace functionality.
OK
Cancel

If the document has been changed, the import or replace functions should be used instead. There will be an option to unlock the document when those functions are used.

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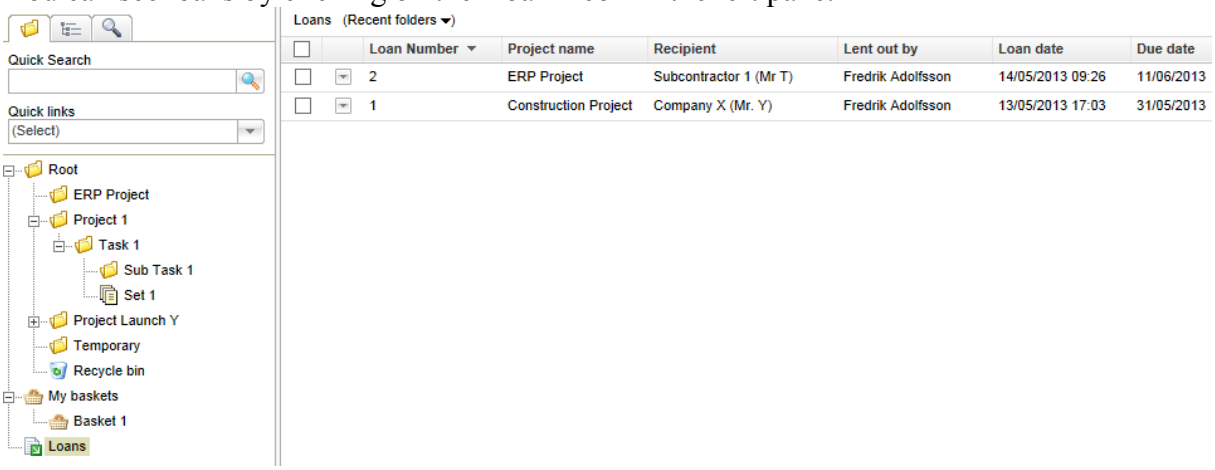
You can see loans by clicking on the “loan” icon in the left pane.

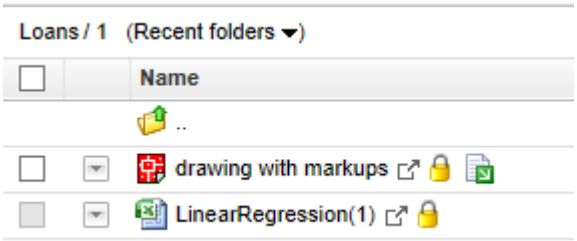


Loans

There are only a limited number of context menu options for a loan:

Loan context menu

Click on the loan number or “open” in the context menu to see which documents that are included in the loan.



Documents in a loan

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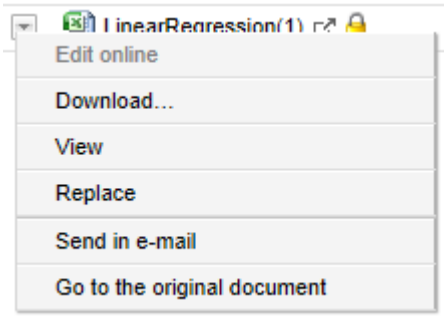
There are fewer options when you work with documents in a loan:

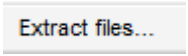


Document in a loan context menu

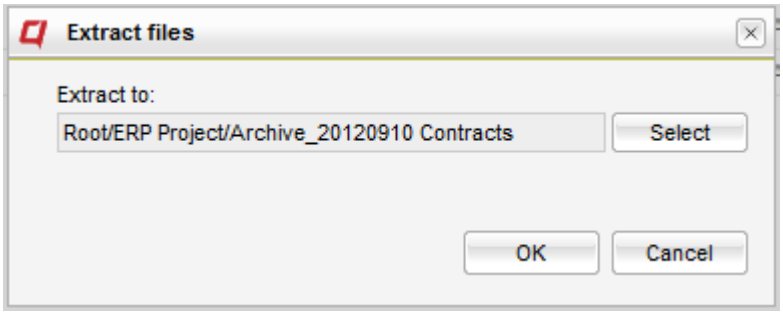
Go to the original document if you want to have the full set of options.

Extracting zip files

Using the "Extract files…" context menu option makes it possible to extract files from a zip file.

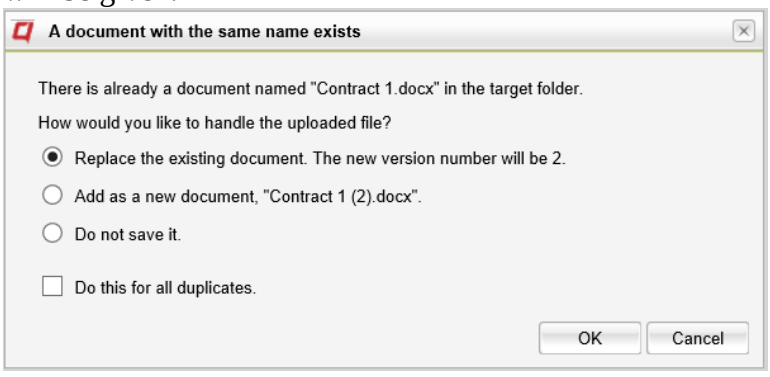


You are given an option to choose destination folder for the extraction.



Zip file extration

If a zip file is extracted and a document already exists, the option to replace files will be given.


A document with the same name exists
There is already a document named "Contract 1.docx" in the target folder.
How would you like to handle the uploaded file?
Replace the existing document. The new version number will be 2.
Add as a new document, "Contract 1 (2).docx".
Do not save it.
Do this for all duplicates.
OK
Cancel

Replace documents via file extraction

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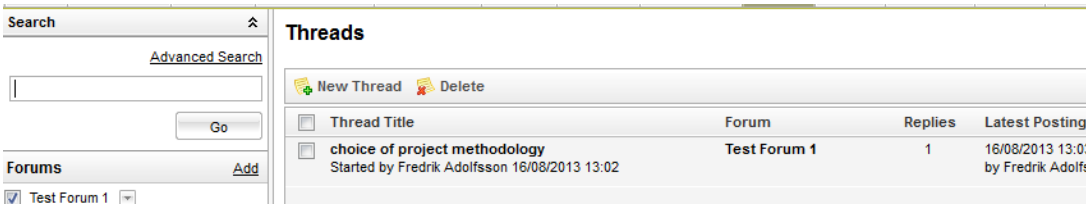
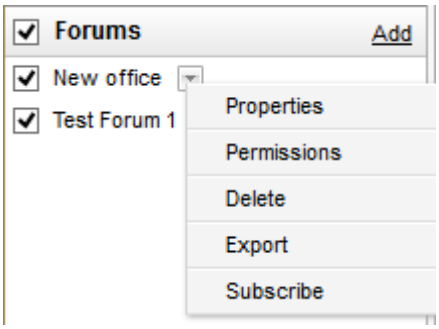
Discussion Forum

When opening the Discussion Forum, the left pane contains a search toolbox as well as a list of the forums available. The right pane lists the forums in more detail, including number of threads, postings and information about the latest posting.



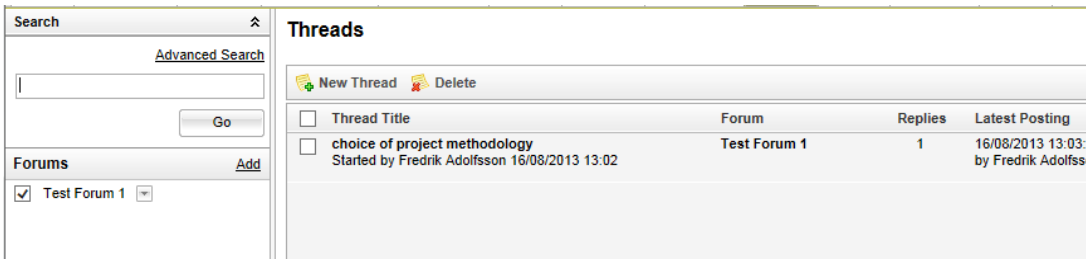
The Search toolbox and listing of forums in the left pane, detailed information about the forum threads in the right pane.

Click on a Forum context menu to see Properties and Permissions or to Delete or Export a Forum.



Forum context menu

The threads of the marked forums are displayed.



Threads in a forum.

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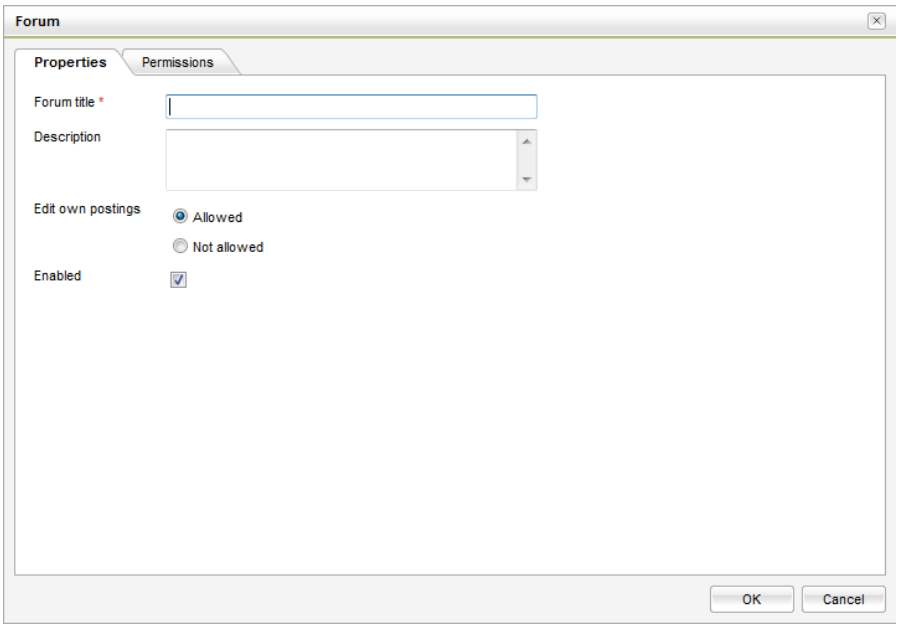
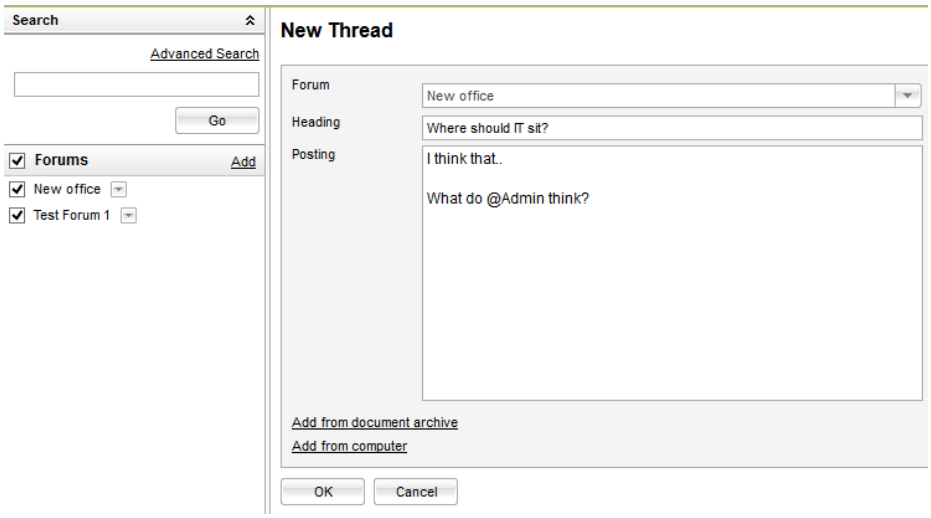
Creating a new forum

Click on "Add" next to "Forums" in the left pane to create a new Forum. Enter the title of the forum and a voluntary description. Select if the users shall be able to edit their own postings. Here you can also disable a forum that is no longer in use. Set permission for the forum by clicking on the Permissions tab.



Creating a new thread

To post a new thread, click on "*New thread" in the right hand panel.*. Enter Forum, the Heading and the posting for the thread. Click OK to save the thread.



Creating a new thread.

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In both postings and new threads it is possible to mention users and groups by writing "@" in the text. This will bring up a list of users and groups to select from. The selected users will get an e-mail with the posting content.

It is also possible to attach files from the document archive or the local computer.

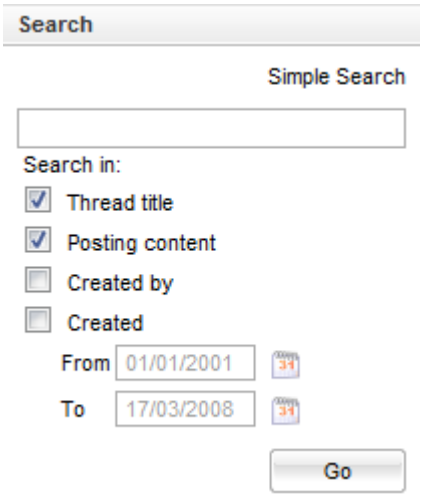
Once a thread has been created, users can create new postings on the thread. It is also possible to receive an e-mail notification when a reply has been entered to your posting by subscribing to the thread.

Subscribe to a thread in order to receive e-mail notifications.

Threads can be exported by clicking "Export" and they can be sorted in ascending/descending date order.

Searching the Discussion Forum

The Discussion Forum is provided with a search engine, which has a simple and an advanced mode. You can select a specific discussion topic, enter free text and/or limit your search by selecting a date limit.



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Searching the Discussion Forum.

Postings on the Internal Web

Postings can be displayed on the first page of the internal web, just like news items. Please see the Web publishing manual for more information about publishing on the first page.

Forum Postings
Fredrik Adolfsson 17 Mar
This is the new thread about t...
This is the first text on this topic
Fredrik Adolfsson 16 Aug 2013
choice of project methodology
the best one in my opinion is....
Fredrik Adolfsson 16 Aug 2013
choice of project methodology
Which of the following methodologies...
[All]

Forum postings on the internal web.

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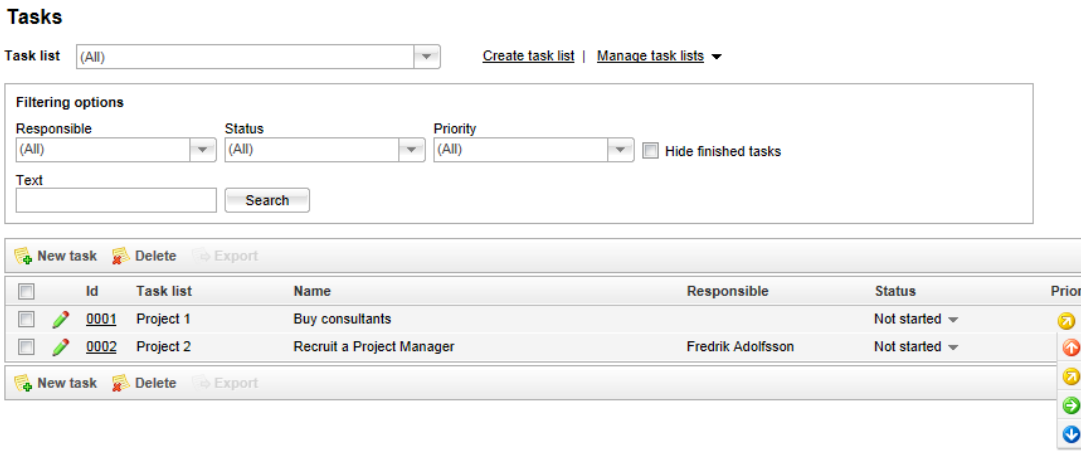
Tasks

The task module is used to manage to-do lists. Here you can create various task lists where you control who is responsible, task status, priority and due date. Access rights are set on a task list level.



Task module

The module consists of different task lists. The first time you visit this module, you will see all tasks in all task lists that you have access to. After that, any filtering will be remembered until the next time you visit this module. Due dates today or earlier are shown as red. Status and priority can be updated directly in the list.

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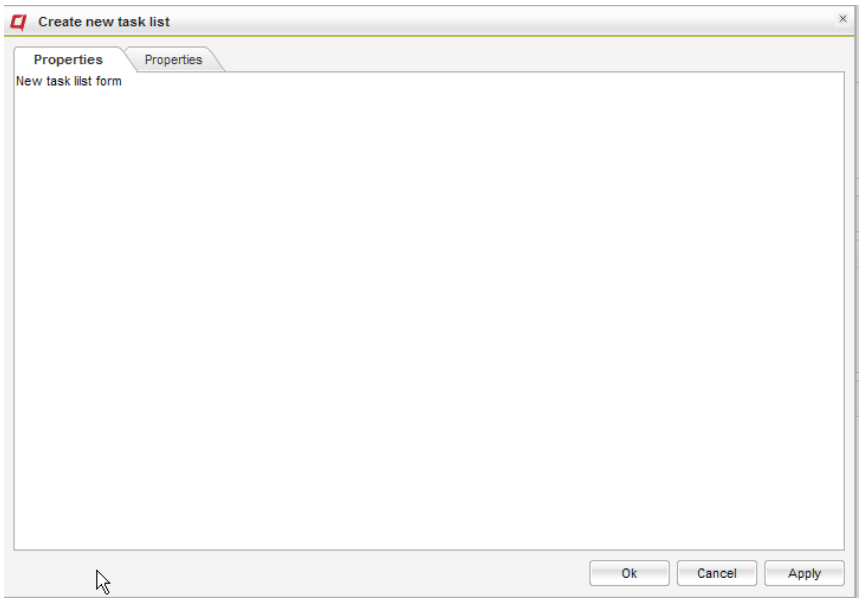
Creating and managing task lists

In order to create a task list, click "*Create task list*" and give the new task list a name.



Task list properties window when creating a new task list

In order to set permissions, click on the "Permissions" tab. The permission settings functions like the permissions in the rest of the system and operates on the task list level, i.e. not on individual tasks.

Once you have created a new task list, press "*OK*".

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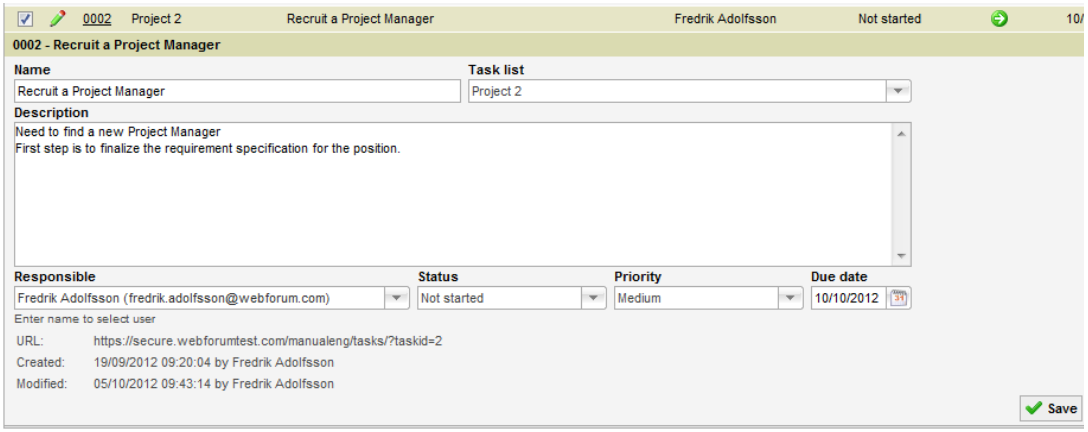
Adding and managing tasks

Adding new tasks is done by pressing the "Add" button. Click on the pencil icon in order to open an existing task for editing. If you just want to have a look at a task without editing, click on the ID number.



A task open for editing

Add the necessary information and press "Save" when you are done. Priorities are shown with icons in the list. I.e. the icon means that a task is urgent and the means that a task is of low priority.

By using the filers, you can see a subset of the tasks. You can filter on responsible, status and priority.

Task list filters

Sorting is done by clicking the column header. By clicking multiple times, you can choose sort order.

You delete tasks by checking the checkbox next to the tasks and by pressing the "*Delete Tasks*" button.

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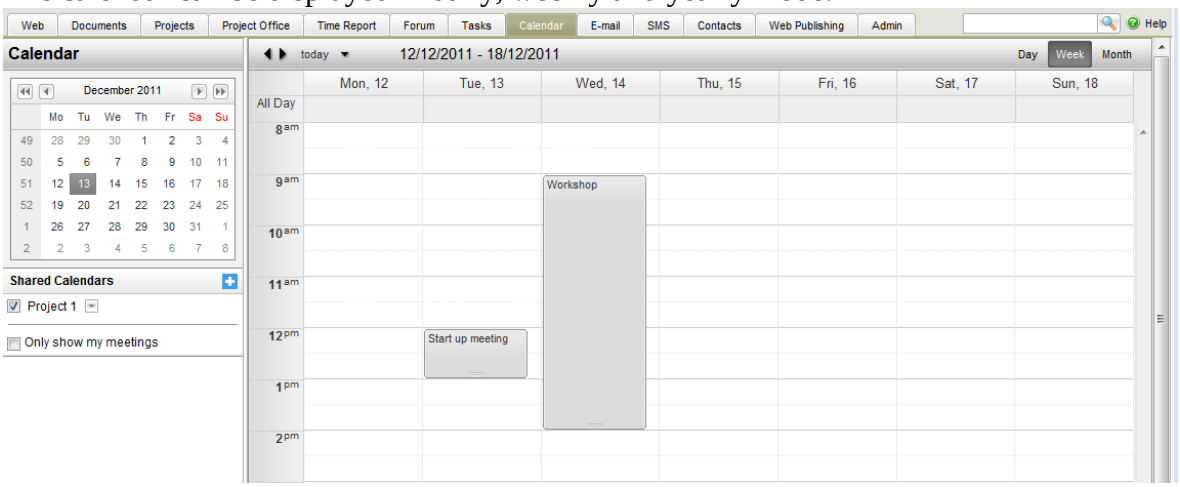
Calendar

The calendar can be used to schedule meetings and to invite people to meetings. The calendar is not switched on for all workspaces. Please contact Webforum or your Webforum Partner if you want this function to be switched on.

The calendar can be displayed in daily, weekly and yearly mode.



Calendar

It is possible to choose which users and groups that are allowed to add meetings to the calendar by pressing the drop down list next to the calendar name.

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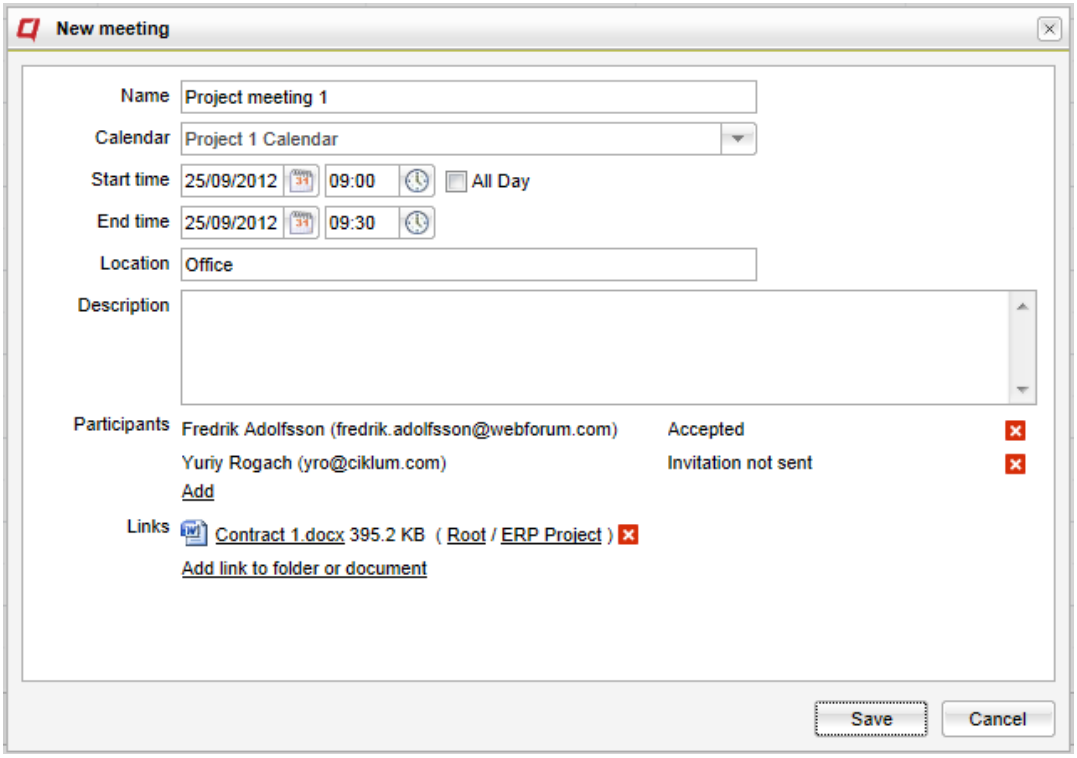
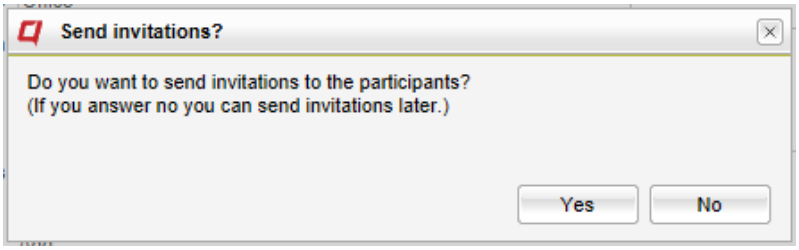
Click on a cell in the calendar in order to edit a meeting. In the meeting pop-up you can set the start and end time, choose a location and invite people to the meeting.



Meeting details

When clicking “Save”, an option to invite participants or not is given.


Send invitations?
Do you want to send invitations to the participants?
(If you answer no you can send invitations later.)
Yes
No

Save message

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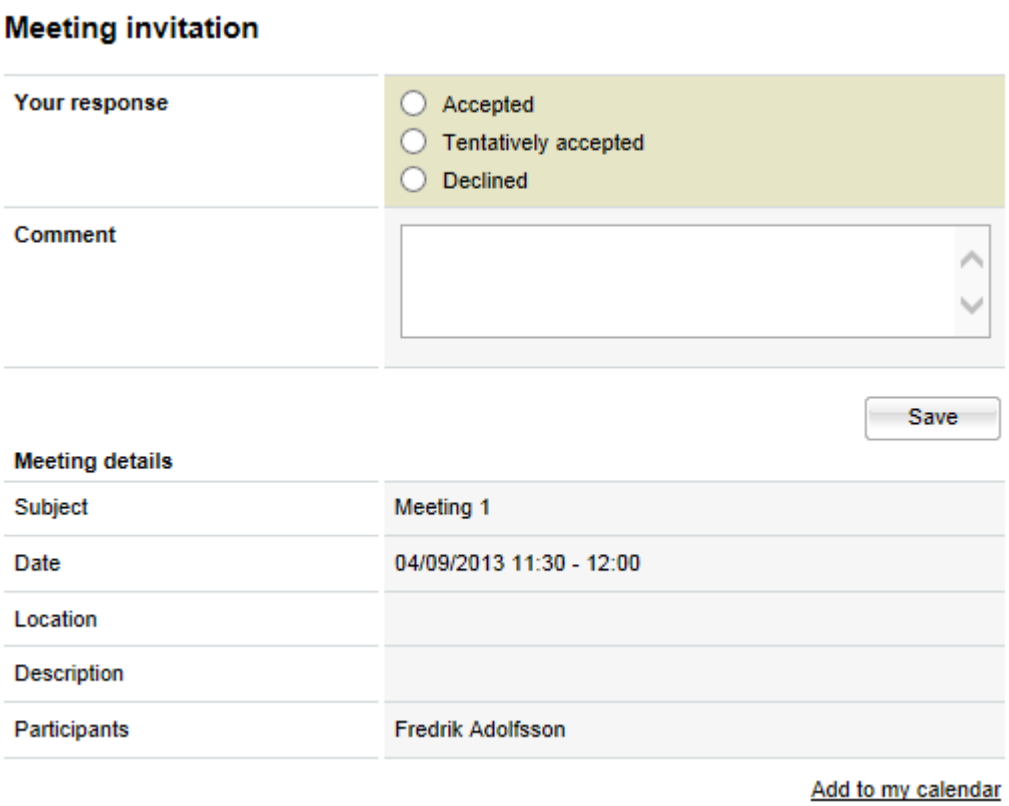
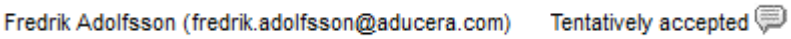
The persons you invite will get an invitation e-mail that they can respond to and say if they are available or not.

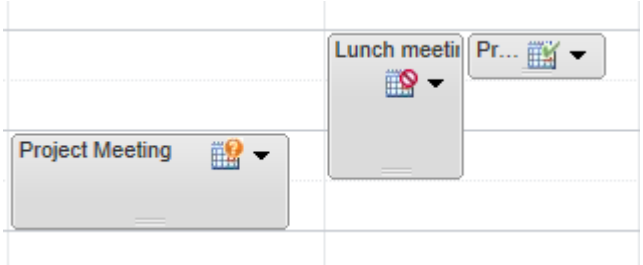


Meeting invitation response page

The comment will show up next to the name of the participant.



Your own meeting response will be displayed for each meeting in the calendar that you have been invited to. There is a symbol for each of the responses – accepted (checkmark), tentatively accepted (questionmark) and declined (stop symbol).



Meeting responses

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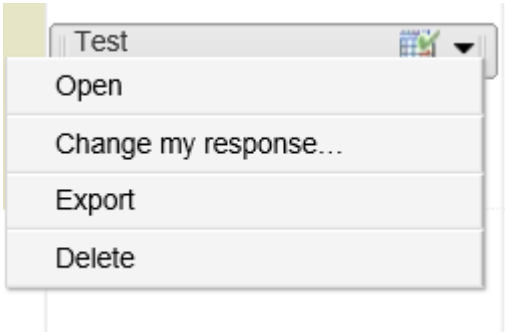
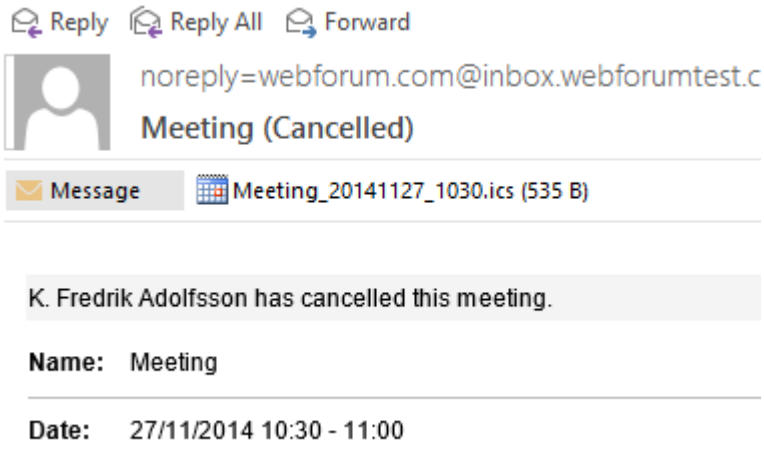
There are a number of alternativs in the drop down menu for a meeting:



Meeting drop down menu

Open will open the meeting.
Change my response… will change your meeting response (accept, tentatively accept, decline)
Export will export the calendar to your local calendar program associated with the calendar file type. This is a good way to get the meeting into your personal calendar.
Delete will cancel the meeting

When a meeting is cancelled, the participants will receive an e-mail with cancellation information.



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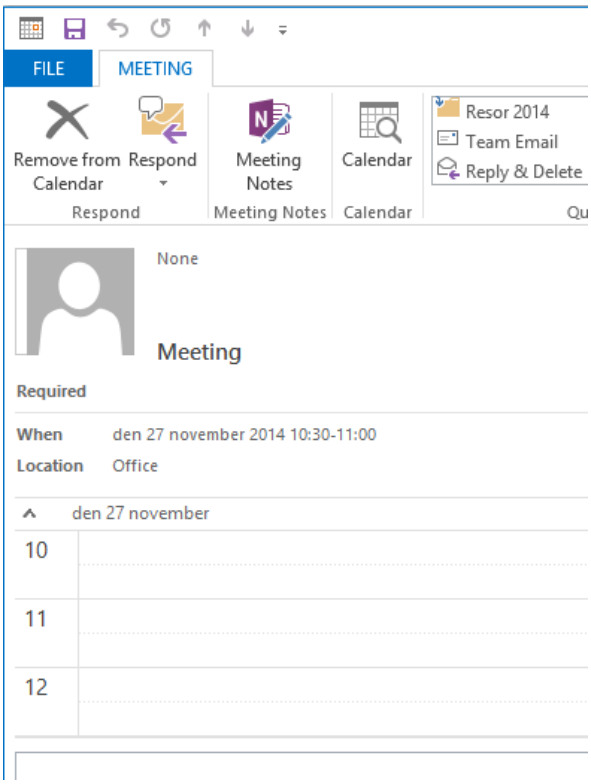
If the included file is opened, the meeting will open and, depending on your calendar program, it will be possible to remove the meeting from the calendar.



Meeting in calendar

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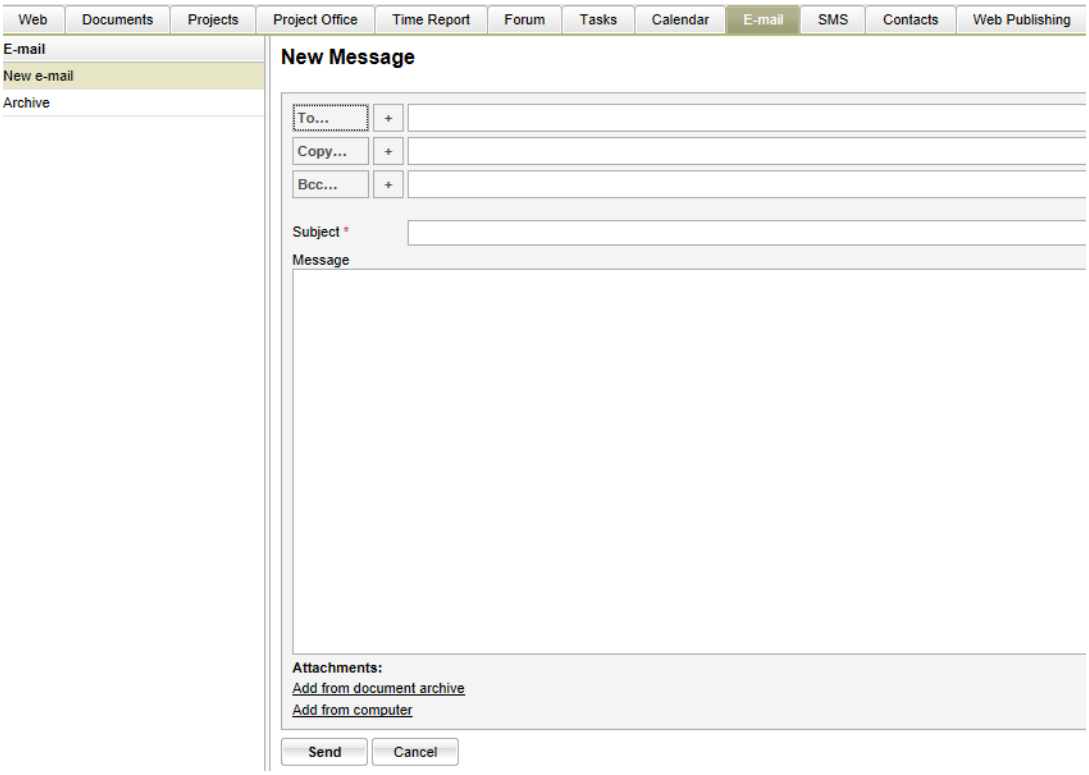
E-mail

Introduction

The e-mail section is used to send messages and attached files, either to individual users or to groups of users.

When accessing the e-mail module, the following options are available:

- New e-mail
- Archive



The start screen of the e-mail module.

E-mail recipients

To send an e-mail to workspace users, click on the *"To", "Copy" or "Bcc"* button to open the Users & Groups dialogue window. Here, users and groups of users can be searched and selected.

In order to add e-mail addresses, for instance to persons without access to the workspace, click on the "+" sign.

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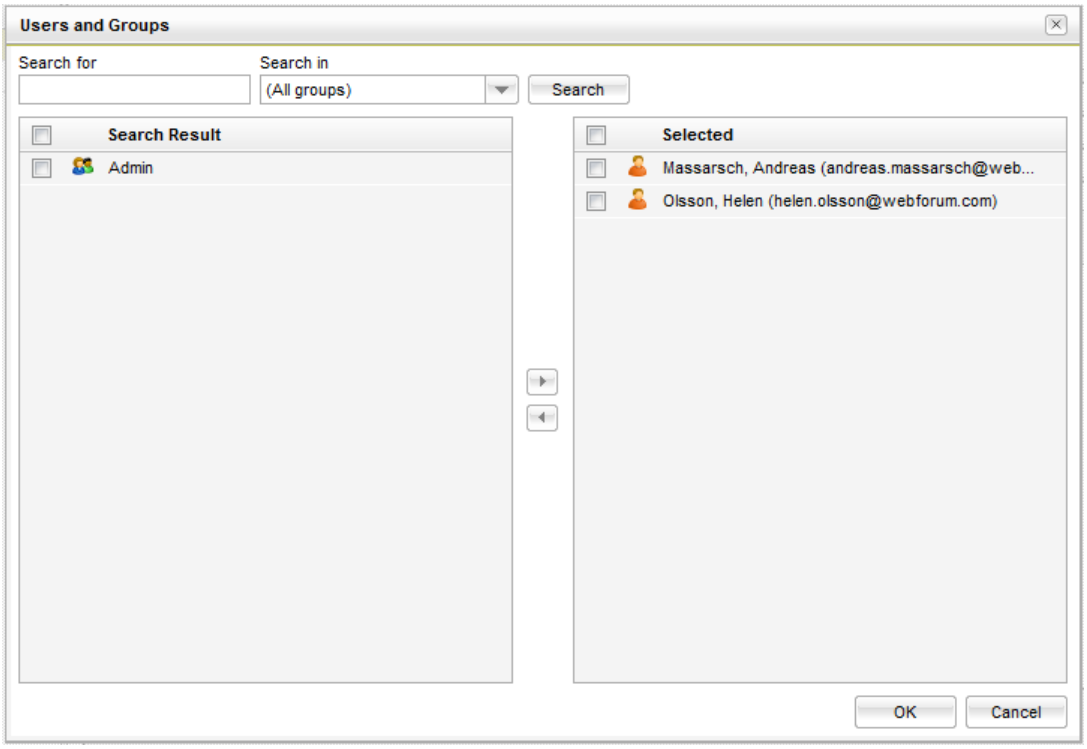
E-mail to Users & Groups

In order to select all users, click on the group name "All Users" and use the upper arrow icon in between the boxes to move the group to the *Selected* box. Click on the "*OK*" button to finish and return to the e-mail.

To select a group or an individual user, open the dialogue window. Use the search function, described below, to find specific users or groups and click on the arrow icon to move them to the right box. Finish by clicking "*OK*".

Remove a user or group by opening the Users & Groups dialogue window, mark the checkbox for a user or a group in the *Selected* box and click on the lower arrow icon in between the boxes. Finish by clicking "OK".



Selecting the users and group, that shall receive the e-mail.

Search function in the Users & Groups dialog:

Generic behaviour

- Search is not case sensitive.
- It is possible to search with wild card "%"

Finding groups:

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- Enter a search criterion and press the search button. The search result will display all groups and users that meet the search criterion.
- Select a group from the drop down menu in the field "*Search for*". The default value is "All groups", meaning that all users and groups are displayed in the search window.

Finding users:

- Enter search criterion in the format "First name, last name". E.g. "Adam Svensson".
- It is possible to only search on first name or only on last name.
- Search with wildcard "%". e.g. "Adam %son", results in all users with first name Adam and last name ending with son.
- In order to find all users in just one group, select group name in the field "*Search for*" and press search.

Subject and Message

Similar to conventional e-mail software, a field is provided for the subject of the messages, and a separate textbox for entering the actual message. If you wish to send a long message, it is recommended to draft the message using a text-editing program, such as Microsoft Word or Notepad, where the spell-check function is available. The message text can then be pasted into the textbox. However, text formatting will be lost.

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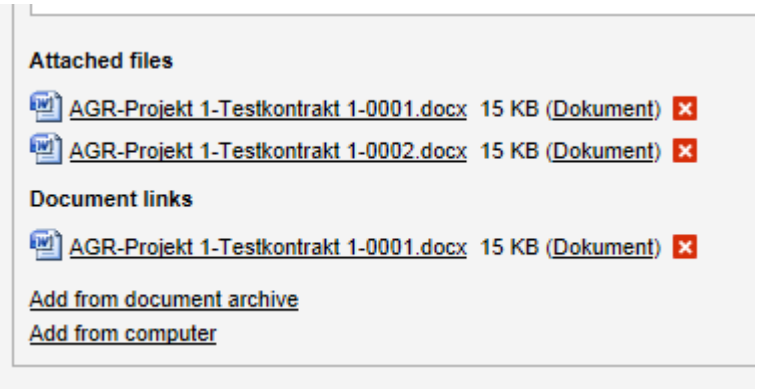
Attachments

There is no restriction on the number of attachments that can be added to each e-mail. But there is a limit for the total file size of attachments (usually 2 Mb).

If you need to distribute larger files, consider posting the file in the Documents section of the Workspace. Notify the users by e-mail to download the file. You can attach the document URL to the e-mail if you like (see the document archive description).

To add an attachment, click on one of the "Add from …" links to choose a document. The file will now be displayed in the attachment field.


Attached files
AGR-Projekt 1-Testkontrakt 1-0001.docx 15 KB (Dokument)
AGR-Projekt 1-Testkontrakt 1-0002.docx 15 KB (Dokument)
Document links
AGR-Projekt 1-Testkontrakt 1-0001.docx 15 KB (Dokument)
Add from document archive
Add from computer

Attachments

If there are external users, i.e. without access to the workspace, the file should be attached as a file and not a link.

Sending

When clicking "*Send*", the message will be distributed to all recipients. A confirmation will be displayed when the message has been successfully sent. The content of your e-mail message will now be stored in your personal e-mail archive (more information below).

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Archive

The *Archive* contains a list of all e-mail messages you have sent. The list shows the subject and mailing date of each message. By clicking on the subject, information about the e-mail such as recipient(s) and the content (text message and attachments) is displayed.

Attachments are not physically stored in the e-mail archive of the Workspace. Note that the archive only shows the messages, which you have sent. Other users will not be able to see your personal e-mail archive.

E-mail from other parts of the system

E-mail can be sent from other parts of the system as well, for instance the document archive. Depending on the module, the e-mail will work in different ways. In the document archive, the e-mail will include selected documents.

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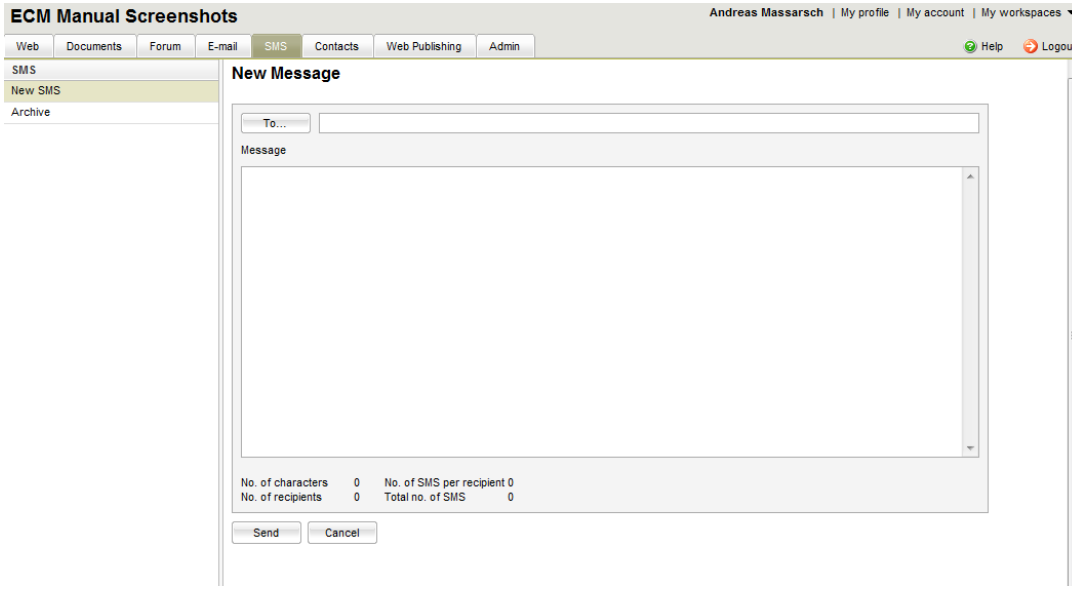
SMS

Introduction

The SMS function is used to send text messages to individual users or groups of users. The procedure is similar to the procedure used to send e-mails.

When opening the SMS module, the following two options are available:

- Send SMS to individual users and/or groups of users
- Access your personal SMS archive



Form used to send SMS messages.

SMS recipients

To send an SMS, click on *"To..."* to select the users and/or groups to receive the message. In order to select all users, click on the group name "All Users" and use the upper arrow icon in between the boxes to move to the *Selected* box. Click the "*OK*" button to finish and return to the SMS window.

To select a group or an individual user, open the dialogue window. Use the search function, described in the "*E-mail recipients*" section, to find specific users or groups. Click on the arrow icon to move them to the right box. Finish by clicking "*OK*".

Remove a user or group by opening the Users & Groups dialogue window, mark the checkbox for a user or a group in the *Selected* box and click on the lower arrow icon in between the boxes. Finish by clicking "OK".

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Note that only those users which have provided a cellular phone number will be enabled in the User & Groups dialog. Users or groups, which have missing or incorrect phone numbers, will not be selectable.

Sending

Before clicking "*Send"*, it is possible to check the number of messages that will be sent to the recipient(s). There is a limit of 160 characters for one text message. If you use more than 160 characters, the SMS will be divided into two or more messages. On the page, there is one counter showing the number of characters and one showing the number of messages per recipient.

When clicking "*Send"*, the SMS will be distributed to all recipients. A confirmation will be displayed when a message is successfully sent. The content of your text message will now be stored in your personal SMS archive (more information below).

If you click on "Status" in the administration module, administrators are able to see how much money you have left to send SMS for. The amount is indicated in the *SMS balance* field.

Archive

The *Archive* contains a list of all text messages you have sent. The list shows the sending date of each message. By clicking on the date, information about the text message, such as recipient(s), the content, and the total number of messages sent, is displayed.

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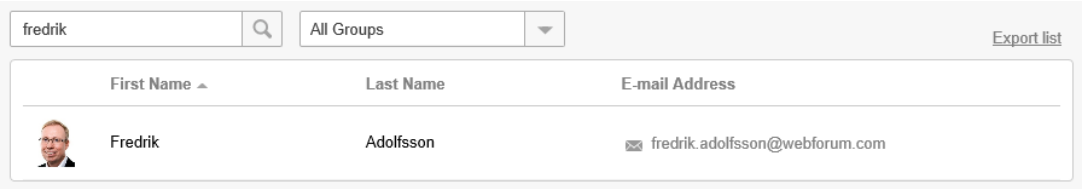
Contacts

The Contacts section displays a listing of all users in the workspace. To view users belonging to a specific Group, select the Group in the drop down menu.

It is possible to search for individual users with the help of a text string in the *Free text* field. The search function will display results from data in Name, E-mail address, and Company fields for all users.



Contacts

To view the contact details for a user, click on the name in the list. To export contacts, press the Export list link.

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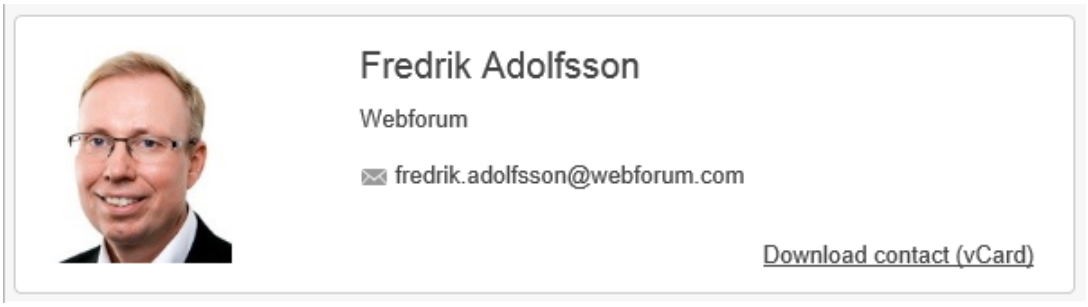

Contact detail

*To change your own information in the Contacts listing module, click **My Profile** in the header. The picture is the same as the one displayed in the top right hand corner of the system. Click on that picture to replace it for the whole system.*

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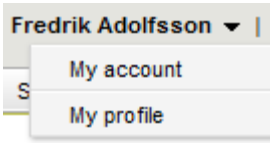
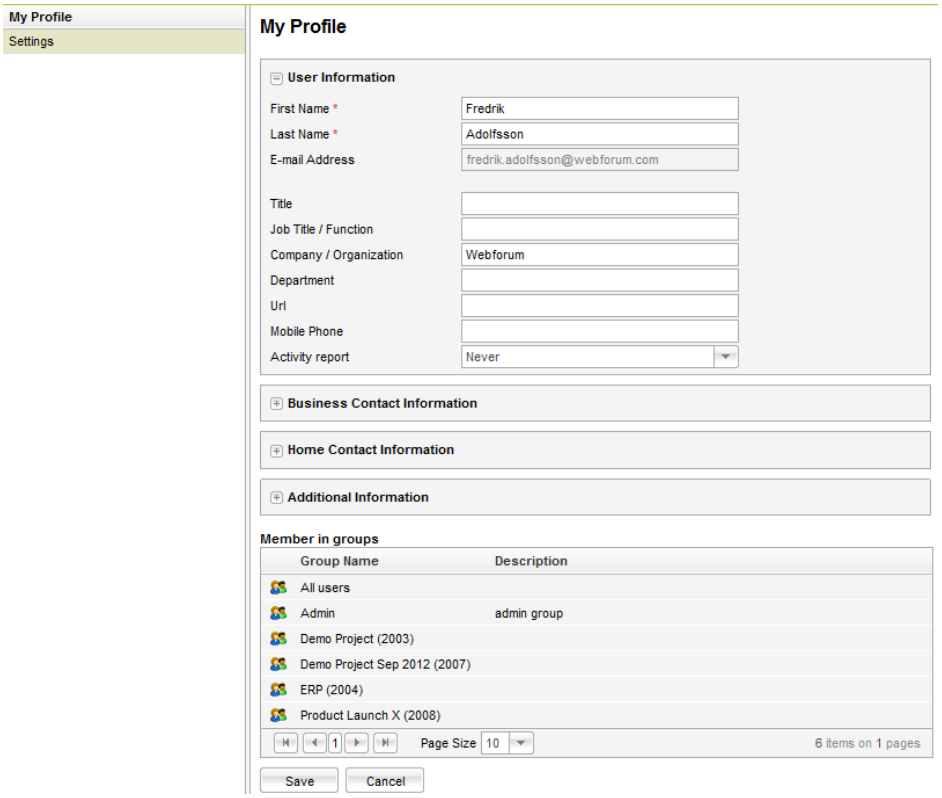
My Profile

Each user of the Workspace can post and update his/her own information from the My Profile area. Other users, with the exception of the Workspace Administrator, cannot alter this information. By clicking on the “My Profile” link in menu, a form containing all current data is displayed.



“My profile”-link in the header.

To update information, click the “My Profile” link and simply modify the appropriate fields. Mandatory fields (first and last name) are marked with an asterisk. Remember to enter a cellular phone number if you want to be able to receive SMS. The international access code for your country should be included, i.e. for Sweden +46 7X XXX XX XX.



Example of information presented in My Profile.

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Activity Report

The Activity Report provides a summary of all new information posted in the Document Archive, Forum and other parts of the Workspace during the time interval chosen by the user. The information, such as a new document version or a new folder, is sent to each user's e-mail address. Actual content in the Activity Report is based on the individual users' group assignment and permissions settings. For example, if a group has a function turned on, but the user doesn't have read access to the document, it will not be included for that user in the report. Another user, with read access, in the same group will get the document included in the report.

Access to function

The Administrator has the option to allow access to this function at the Group level. Each member of a Group with Activity Report access turned on can thereafter select if he or she wants to receive an Activity Report and at which time interval. See details for applying module access for a group in the *Administration* chapter.

User settings

The time interval for receiving an activity report can be chosen individually. To change the reporting interval, navigate to *My Profile* and choose the appropriate option in the Activity Report drop down menu. Click *Save* to finish.

Access to the Activity Report is subject to a user's group assignments and permission settings, and may not be available to all users.

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Administration

Only those with administrator rights have access to the Admin tab.

The left pane contains two sections:

- **Users and groups**
  Manage users, manage groups, import users and export users
- **Workspace**
  View account details, manage workspace settings and view login log

Users and Groups

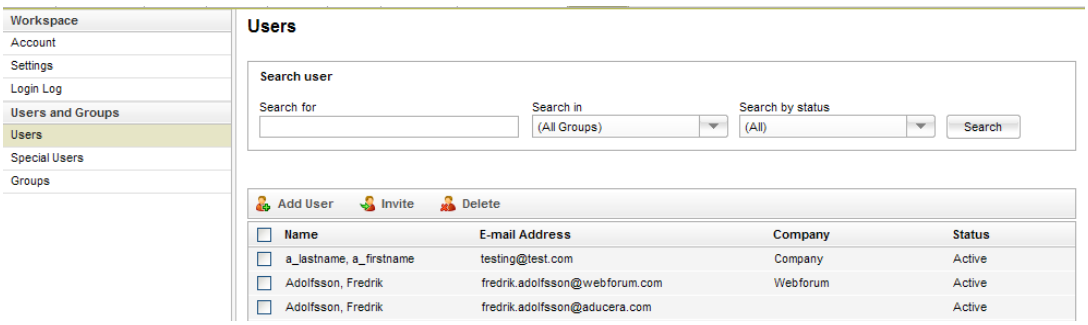
Users

The Users section is used to add, invite, and manage users with access to the Workspace. All users with access to the workspace are listed and can be searched, viewed and edited. To view full user information, click on a person's name.

Users can be deleted and disabled. Disabling a user means that the user will no longer be able to log in, but it will remain in the system. A disabled user is not counted towards the maximum number of users allowed for the workspace. A disabled user can be enabled again from the toolbar.

In the right column of the user listing, the status of each user is shown. A user can have the following statuses:

- Not invited
- Invitation pending
- Active
- Disabled



Manage users

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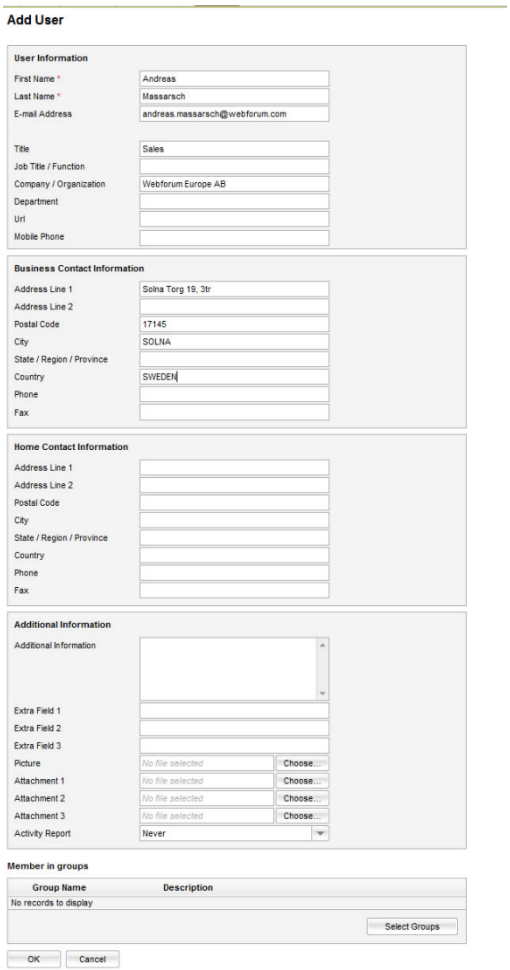
Adding and inviting a User

Adding users

To add a new User, click on “Add user” in the bottom right corner of the Users page. It is mandatory to enter the first name, last name and e-mail address of the user. The user can at a later stage complete the form in the “My Profile” section.

If your workspace has the Project Management modules, i.e. time reporting and project planning, each user will also have a resource category and a responsibility. Resource categories and responsibilities are further explained in the Project Management manual.

At the bottom of the form, select which User groups the user should belong to. Finish by clicking on OK. To add additional users, repeat the above process.



Adding a user to the Workspace.

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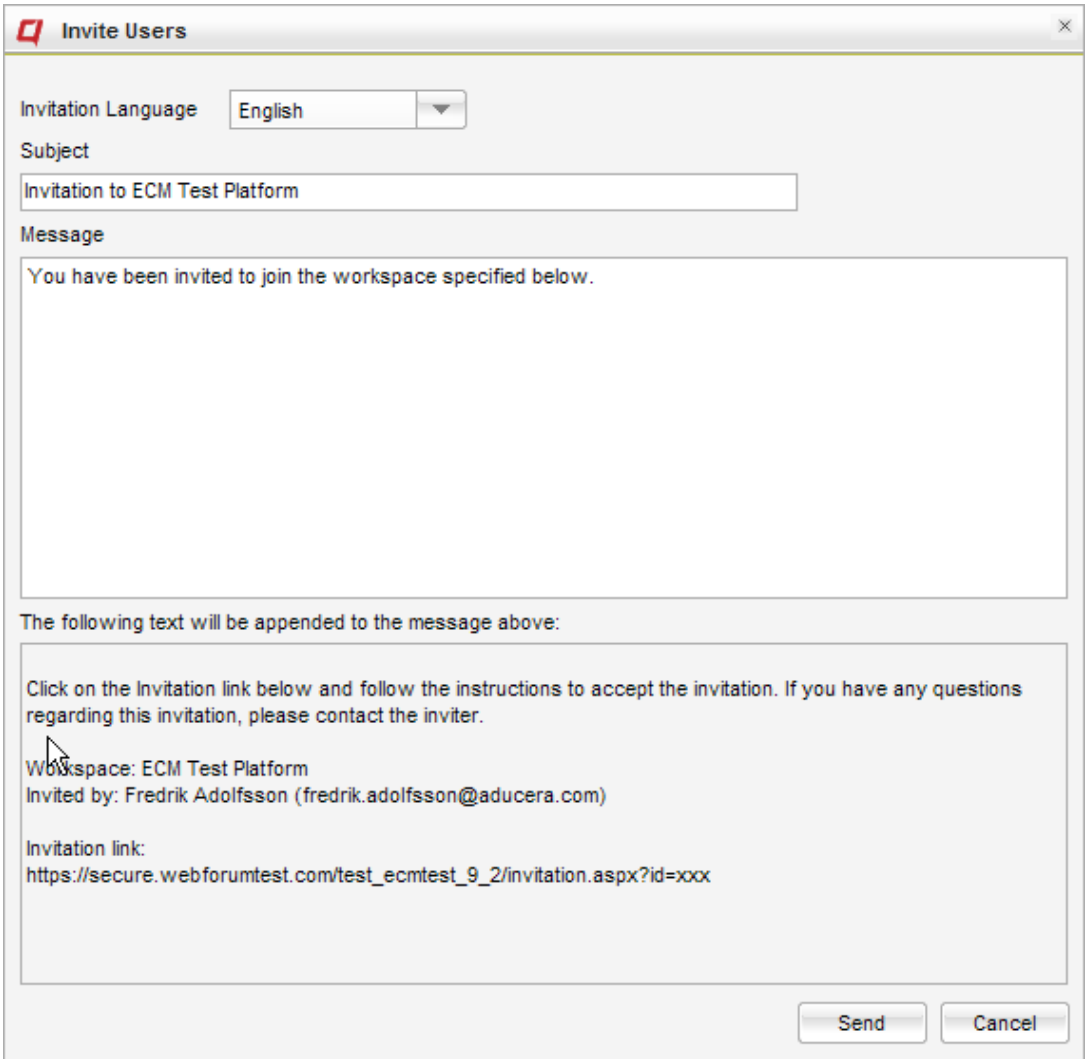
Inviting users

Once users have been added to the Workspace, the next step is to invite the users. Select the users to be invited by marking the checkboxes next to their names – the users should have the status "Not invited".

Click on the "Invite" button in the bottom left corner of the screen. A dialogue box will appear, where there is an option to select the language of the invitation as well as the possibility to add a custom message.


Invite Users
Invitation Language
English
Subject
Invitation to ECM Test Platform
Message
You have been invited to join the workspace specified below.
The following text will be appended to the message above:
Click on the Invitation link below and follow the instructions to accept the invitation. If you have any questions regarding this invitation, please contact the inviter.
Workspace: ECM Test Platform
Invited by: Fredrik Adolfsson (fredrik.adolfsson@aducera.com)
Invitation link:
https://secure.webforumtest.com/test_ecmtest_9_2/invitation.aspx?id=xxx
Send
Cancel

Invite users

After clicking "Send", a confirmation of the number of invitations sent will be displayed. The status of the users will have changed from "Not Invited" to "Invitation Pending".

Each user will receive an e-mail with the invitation. The next step of the process is for the user to click on the invitation URL.

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When the user clicks on the link, a web browser opens where the user accepts the invitation by clicking “Continue”

Invitation e-mail that each user recieves.

```
-----Original Message-----
From: ECM Test Platform [mailto:noreply@webforum.com]
Sent: den 28 maj 2008 10:55
To: Fredrik Adolfsson
Subject: Invitation to ECM Test Platform

Dear Fredrik,

You have been invited to join the workspace specified below.

Message from sender:
inbjudan

Click on the Invitation link below and follow the instructions to accept the
invitation. If you have any questions regarding this invitation, please
contact the inviter.

Workspace: ECM Test Platform
Invited by: Fredrik Adolfsson (fredrik.adolfsson@webforum.com)

Invitation link:
https://secure.webforumtest.com/test_ecmtest_8_1/invitation.aspx?id=FwWrd6s

When you have accepted the invitation you can re-use the invitation link to
return to your workspace.

Provided by Webforum
```

Accept invitation.

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A user account is created for the user – the e-mail address becomes the user name. The final step of the process is for the user to set the password. The password is case sensitive.

Set password
Your user account (per.graske@telia.com) has been created.
Please enter a password that is at least eight characters long. The password must include at least one special character, for example: !_"#¤%&/=?+
Please enter desired password
Password
Confirm password
Save password
OK

Users set their own passwords.

Once the password is set, the user is taken to the Start page of the Workspace and the status of the user is changed from "Invitation Pending" to "Active".

If a user already has a Webforum User Account

If the user already is a member of a Webforum Workspace, and thus already has a Webforum User Account, the system will ask if the user wants to connect their existing account to the Workspace. This allows the user to switch between Workspaces once logged in.

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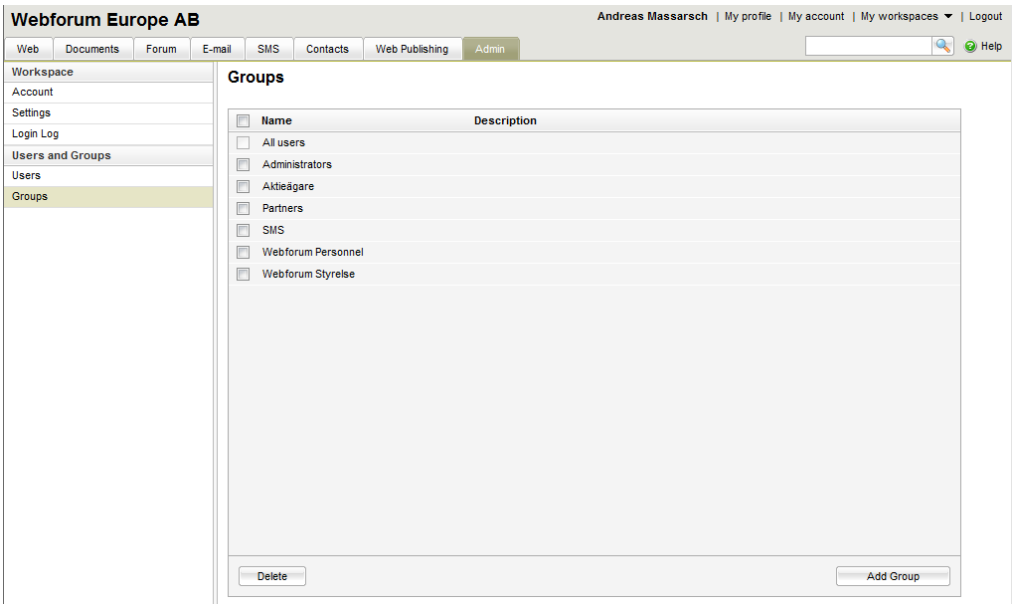
User groups

Planning of User groups

When launching a Workspace, the Administrator must think of the objectives to be achieved and establish which users shall be invited/allowed access. The number of User groups is only limited by practical considerations and a user can belong to several User groups. It can be useful to first establish a list of User categories. The names of the User groups for each category can be chosen by the Administrator.

Once the User groups have been established, it is time to identify the Modules to which each User group should have access.

The Administrator can select the permission settings of a User group. By default, a user group does not get any specific rights.



Listing of User groups.

Workspaces that have Project Management modules switched on will also have Project Groups. Read more about Project Groups and how they work in the Project Management manual.

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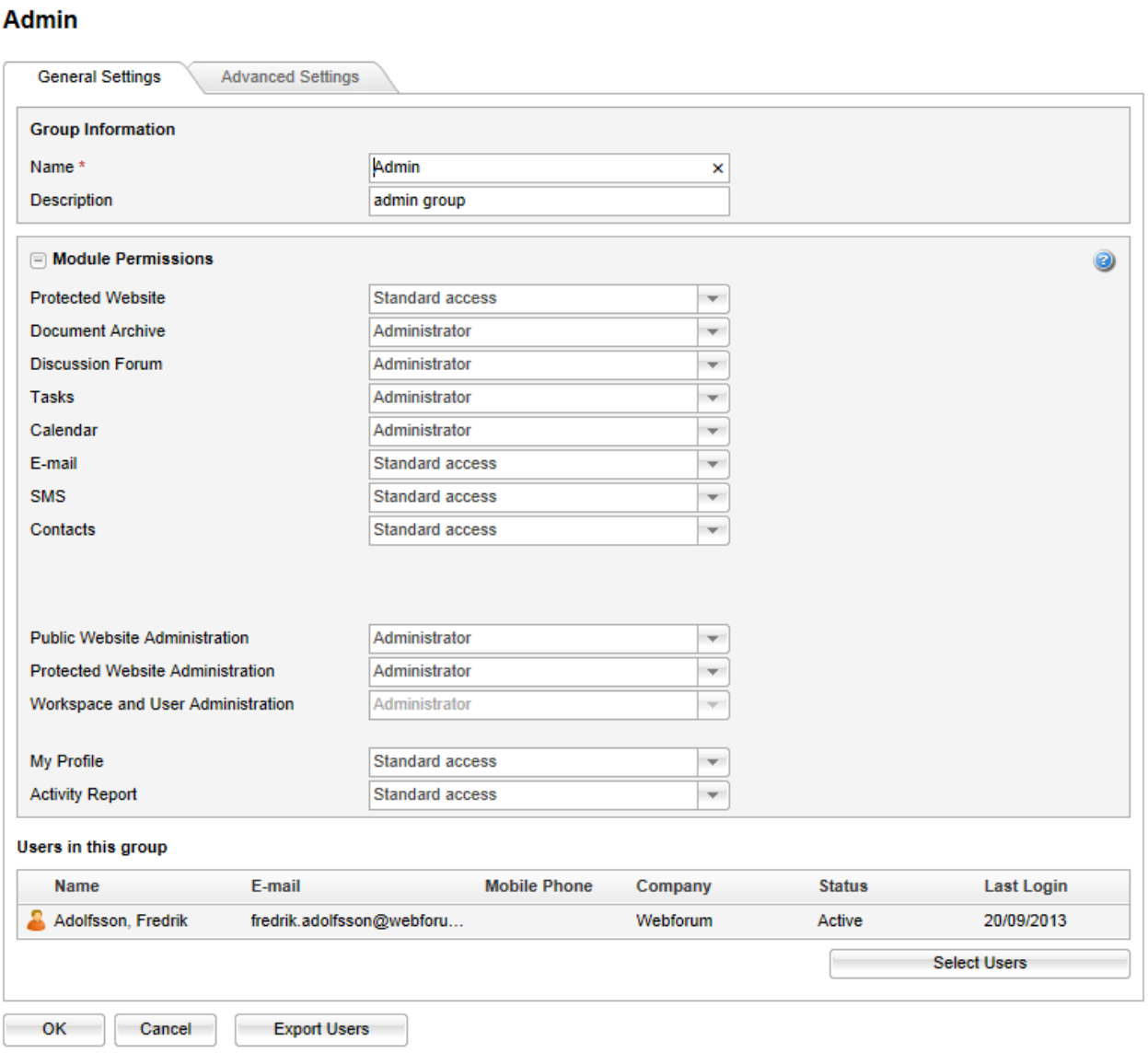

Group settings

Form for setting Module Permissions for a User group, and for adding and removing users to and from the gr

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Creating a New User group

Click *Add Group*. After entering the User group name and a description, a drop-down list becomes available for each module. By assigning Module Permission Settings to User groups, the Administrator can control access to the Modules of the Workspace.

The options for all available Modules are listed below with comments.

TOOL	OPTIONS	COMMENT
Protected Website	No access	The tool is not visible for the user
	Standard access	The user can access the Protected Website
E-mail	No access	The tool is not visible for the user
	Standard access	The user can send e-mail using the Workspace
SMS	No access	The tool is not visible for the user
	Standard access	The user can send SMS using the Workspace
Documents	No access	The tool is not visible for the user
	View only	The user can only see documents through the built in viewer. The user cannot download documents.
	Standard access	The user has standard access to the Document Archive
	Administrator	The user has full administration rights to the Document Archive
Discussion Forum	No access	The tool is not visible for the user
	Standard access	The user can read and write postings
	Administrator	The user has full administration rights to the Discussion Forum
Tasks	No access	The tool is not visible for the user
	Standard access	The user can access the tasks module
	Task list creation	The user can create task lists
	Administrator	The user can administer the module
Calendar	No access	The tool is not visible for the user
	Standard access	The user can access the Calendar module
	Administrator	The user can administer the module

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Contacts	No access	The tool is not visible for the user
	Standard access	The user can access the Contacts module
My profile	Not accessible	The tool is not visible for the user
	Standard access	The user can modify his personal settings
Activity Report	Standard access	The user can not receive an Activity Report
	Accessible	The user can receive an Activity Report
Public Website Administration	No access	The tool is not visible for the user
	Standard access	The user can publish web pages, news and events depending on object permission settings
	Administrator	The user has access to all sections of the Public Website Administration
Protected Website Administration	No access	The tool is not visible for the user
	Standard access	The user has standard access to the Protected Website and can publish web pages, news and events depending on object permission settings
	Administrator	The user has access to all sections of the Protected Website Administration
Workspace and User Administration	No access	The Administration tab is not available to the user
	Group Administrator	The user of this group has access to the Administration tab but can only see the “Groups” option in the left pane. A group administrator can add/remove users to/from groups that he/she has access to (see below for details)
	Administrator	The user of this group has access to the Administration tab

If your workspace has the Project Management modules switched on, there will be three additional modules available, Project Planning, Project Office, and Time Reporting, please see the Project Management manual for details.

Adding/removing users to/from a User group

It is possible to change which users that belong to a User group from within the User group form. Simply click on *Select Users* to open the Users & Groups selection window. To add users to the group, mark the users in the search result and click on

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the arrow to move them. Finalize by clicking OK. To remove users, mark the selected users and click on the other arrow.

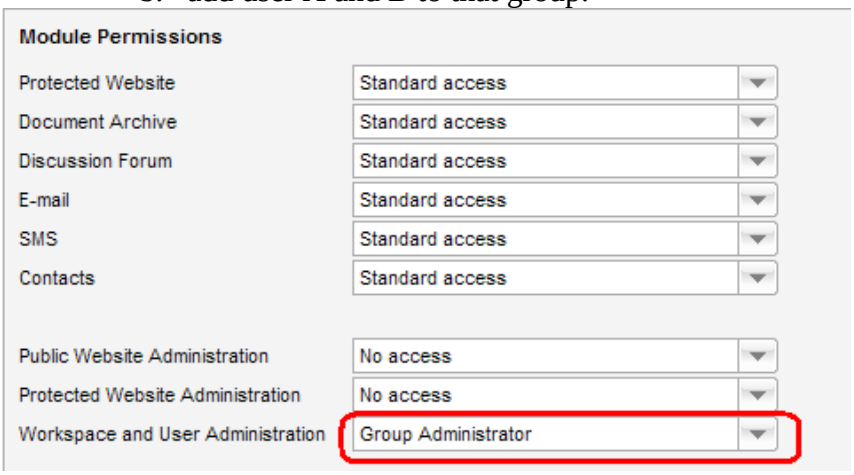
Advanced Group settings

Group Administrator

A Group Administrator can add/remove users to/users from groups that he or she has access to.

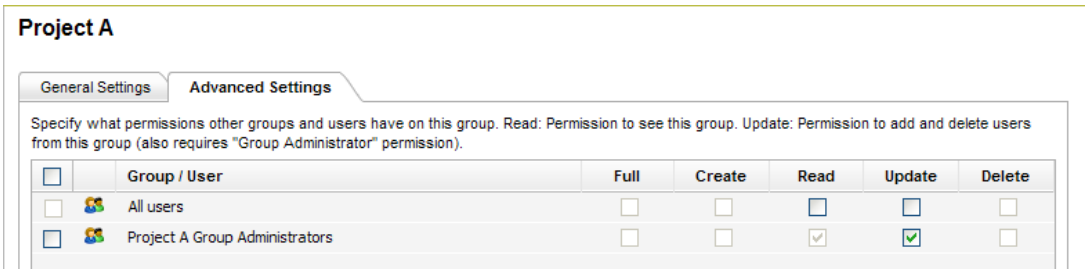
If you want to let User A and B control users in Group "Project A", you must:

1. Create a Group "Project A Group Administrators"
    a. give the Group "Group Administrator" rights, see picture below
    b. add user A and B to that group.



Applying the function Group Administrator in the group details section Module Permissions

2. Go to Group "Project A"
    a. open the permissions tab
        i. add the "Project A Group Administrators" group to the list of users and groups
        ii. give this group "Update" permission


Project A
General Settings
Advanced Settings
Specify what permissions other groups and users have on this group. Read: Permission to see this group. Update: Permission to add and delete users from this group (also requires "Group Administrator" permission).
Group / User
Full
Create
Read
Update
Delete
All users
Project A Group Administrators

Applying Update permission on the advanced settings tab for the group Project A

Detailed description for a Group Administrator;

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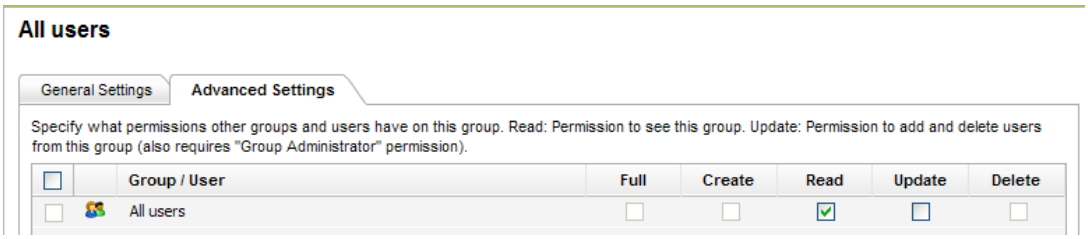
- A Group Administrator can access the Admin tab but will only see the options “Groups” and “Users” in the left pane.
- In the group listing page he/she can only see groups that he/she is allowed to see. The same is true for the Users page.
- Update access means that the Group Administrator can add and remove users to/from the group.
- Read access to a group means that all users from this group are available in the User & Group dialog for the Group Administrator.

Note that a Group Administrator has restricted access to the administration functions. For instance, the Group Administrator cannot create or delete groups or change module permissions for groups.

A group administrator can create and invite user. The group administrator can also delete users – but only users connected to groups the GA has update permission for.

Hide groups for groups

As described in the example above it is possible to control which users and groups that can see certain groups and users in the users and groups windows, for instance in the permission windows used in the document archive, the forum, the website administration or when sending E-mail.


All users
General Settings
Advanced Settings
Specify what permissions other groups and users have on this group. Read: Permission to see this group. Update: Permission to add and delete users from this group (also requires "Group Administrator" permission).
Group / User
Full
Create
Read
Update
Delete
All users

The advanced settings tab for Group Administration

Since most workspaces only are open for a selected group of people, the default setting is that all users can see information about all other users. However, in some cases it may be necessary to hide users and groups for other users.

For instance, if external users are invited to a company workspace, you may want to give them rights to see information about persons that are working on a certain project, but not other users. Since the default setting is that all users can see a new group, it is necessary to change permissions on all groups if less people are supposed to see them and their users.

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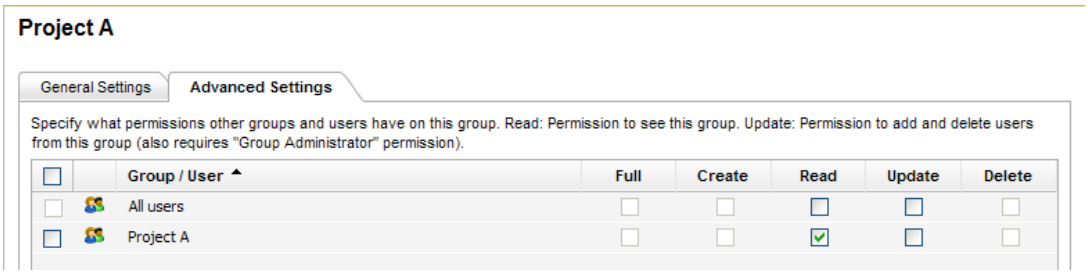
Assuming that your company is running two projects, A and B, and that there are external users in both project A and project B that shall only be able to see other members of their projects, you need to do the following:

- Take away the read permission for all users on the all users group. Since all users belong to this group, all users will be able to see all other users if this group have read permission to itself.
- Set up a group called “Project A” and add all the project members to this group.
- On the permissions tab, take away the read permission for the “all users” group. Add the group Project A to the list and make sure they have read permission


Project A
General Settings
Advanced Settings
Specify what permissions other groups and users have on this group. Read: Permission to see this group. Update: Permission to add and delete users from this group (also requires "Group Administrator" permission).
Group / User
Full
Create
Read
Update
Delete
All users
Project A

The advanced settings tab for group Project A. With this setting users in Project A will only be able to see users in their own group.

- Set up a group called “Project B” and add all the project members to this group.
- On the permissions tab, take away the read permission for the “all users” group. Add the group Project B to the list and make sure they have read permission

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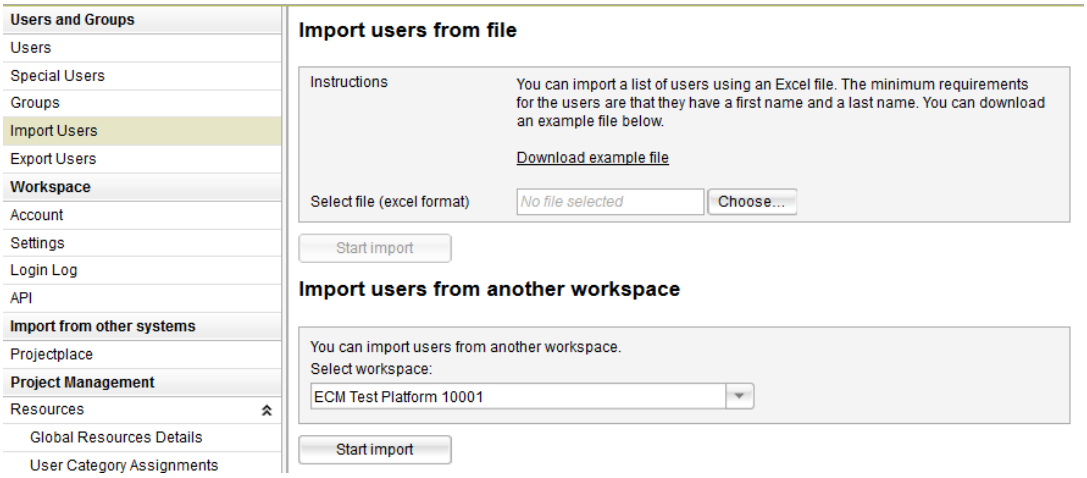
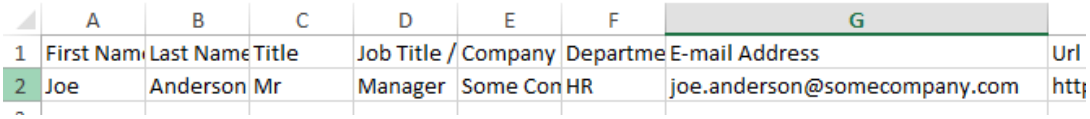
Import users

There are two ways to import users – from file and from another workspace.



Import users

In order to import users from a file – create an excel sheet with each user on a separate rows and the user name, e-mail and other relevant information in separate columns. It is possible to download an example file to use as a template.



	A	B	C	D	E	F	G	
1	First Nam	Last Name	Title	Job Title /	Company	Departme	E-mail Address	Url
2	Joe	Anderson	Mr	Manager	Some Con	HR	joe.anderson@somecompany.com	htt

User import – example file

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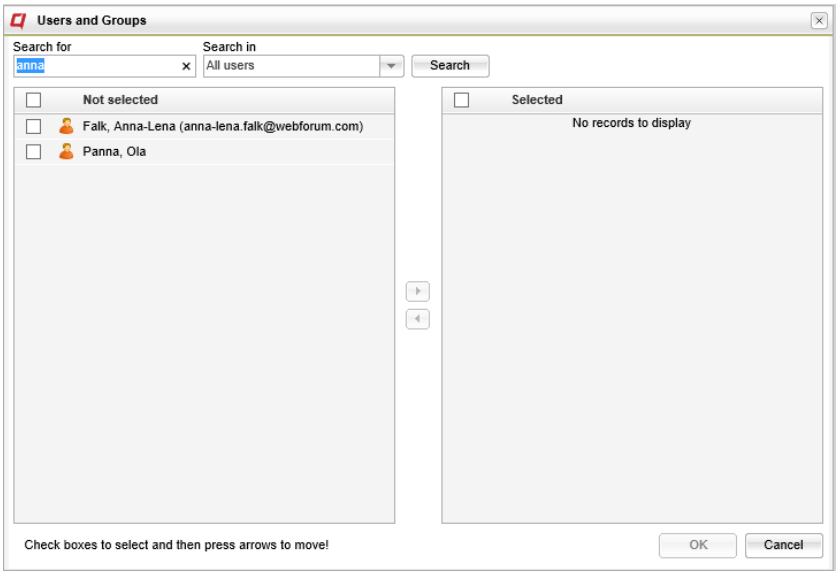
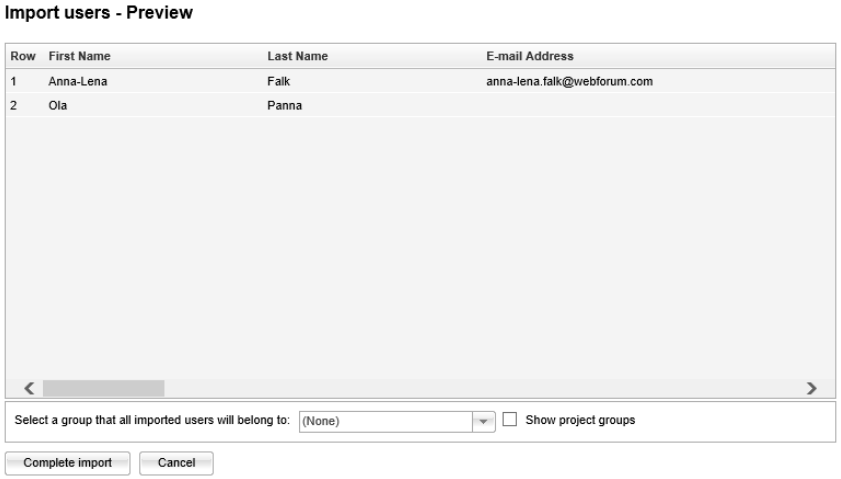
In order to import users from another workspace - select a workspace to import from. Workspaces where you have access to the Contacts tab or have Admin rights are displayed.

Select users to import. Users already added to the current workspace are also displayed. They will not be imported again if selected.



Select users

The users to be imported are displayed and it is possible to add them to a group.



Select group membership and complete the import

Export users

Use Export users to export workspace users to a file in MS Excel format. You can choose to export all users or select from a group.

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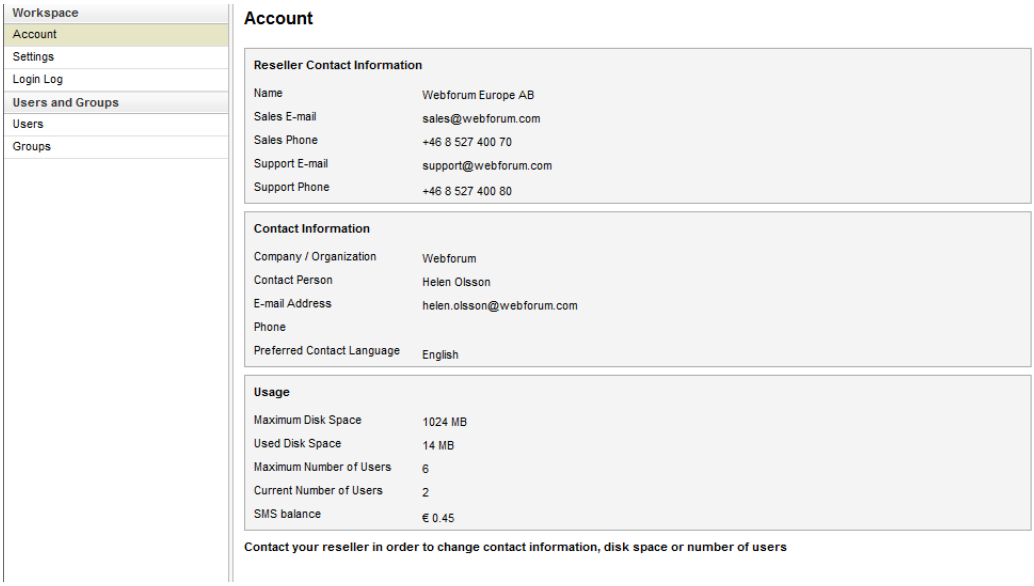
Special Users

Some Workspaces use the “Special Users” function in order to provide large user groups with read access to the platform. Please contact Webforum for details about the use of this function.

Workspace

Account

In the Account section you will find contact details of reseller and the provided workspace contact details. At the bottom, information about disk space, number of uses and SMS balance.



Account details

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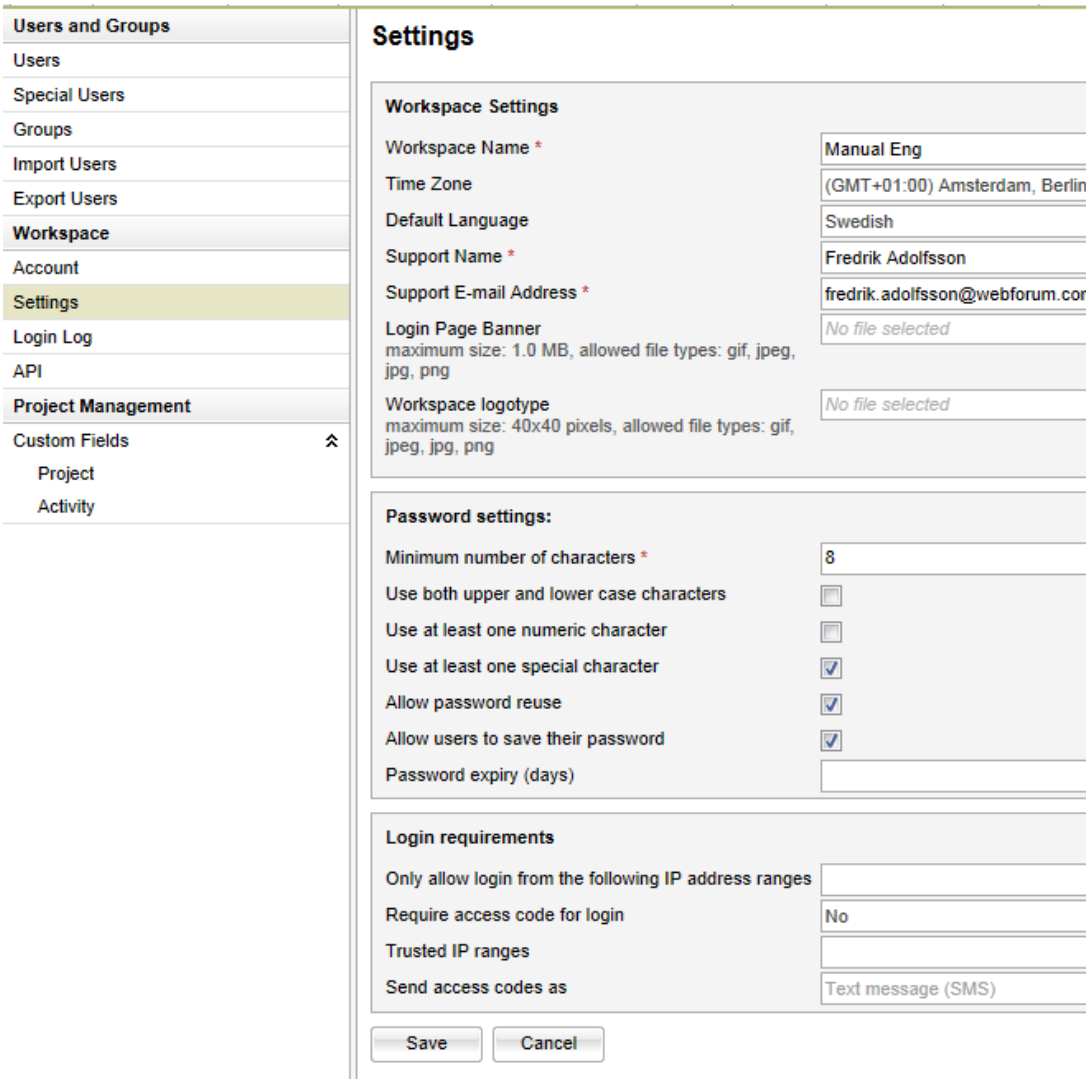
Settings

The workspace settings section allows you to:

- change workspace name
- set the time zone for all time stamps
- set the default language
- set the name and e-mail of the person to be provided as support
- Add a login page banner
- Choose a workspace logotype. It will be displayed in f.i. browser tabs



Settings

Workspace logotype display example

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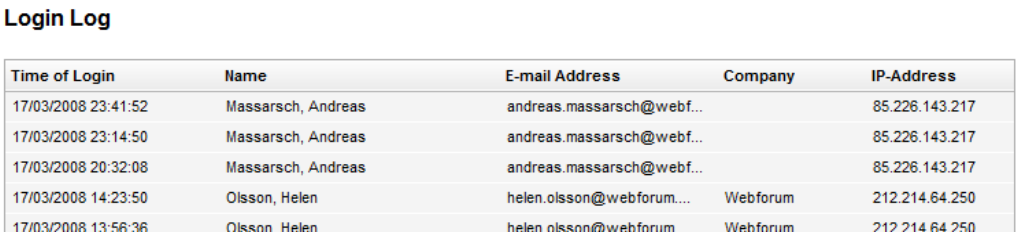
Password settings
Workspace administrators can decide which level of security to apply to a workspace. It is possible to choose both password complexity and how long the interval should be between password changes.

It is also possible to prevent users on a workspace from storing their passwords in the web browser when logging on to Webforum if "Allow save password" is unchecked.

Login requirements (professional)
It is possible to restrict login to specific IP addresses. It is also possible to ask for a one time access code when users log on. Such access codes can be sent by e-mail or SMS.

Login log
The login log shows a list of all users that have logged in to the workspace. By default the list shows the most recent login at the top.



Login log

Projectplace import

Documents, folders, users and groups can be automatically added from Projectplace.com. Contact Webforum or a webforum reseller for more information.

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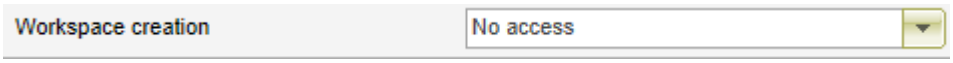
Create New Workspaces

Template workspaces can be created and linked to a master workspace, from which it is possible to create new workspaces based on those templates.

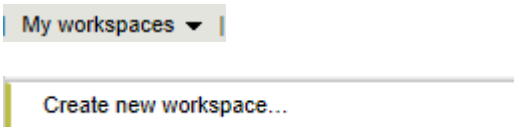
Linking templates to master workspaces is done by Webforum, so please contact Webforum or a Webforum partner if this is a function you would like to use.

New workspaces can be created by users belonging to a group with module permission “Workspace creation”.



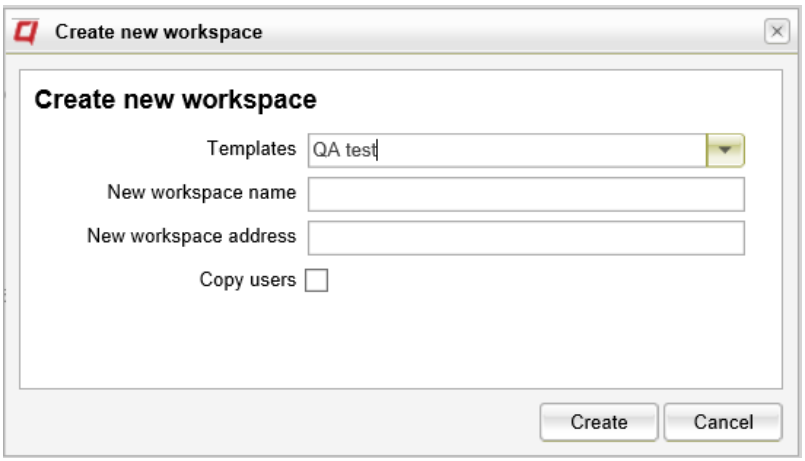
Workspace creation module permission

Users with Workspace creation rights will get a “Create new workspace” option under “My workspaces”. The option will be below the list of workspaces.



Create new workspace

Click the option and you will get a pop up window where it is possible to choose which workspace to use as a template. You must give the workspace a name and and address. The adress will form the last part of the URL, i.e. www.webforum.com/ ”workspace name”. You have an option to include users or not when copying.



Create new workspace pop up.

The new workspace will appear in the list of workspaces.

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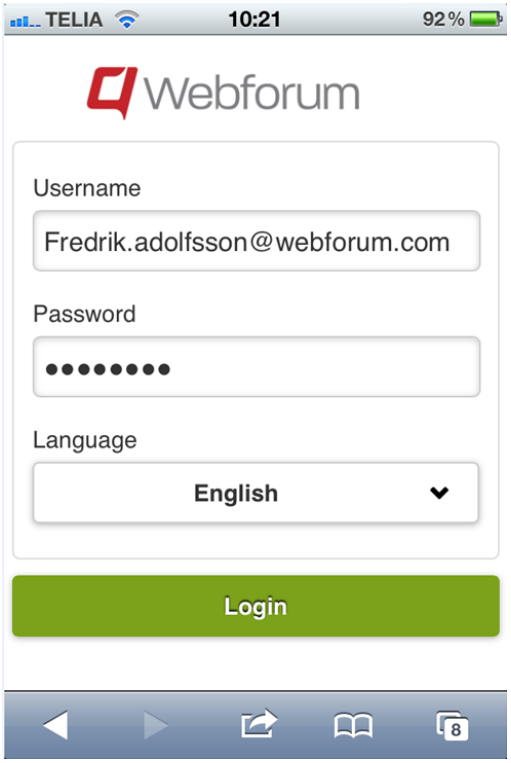
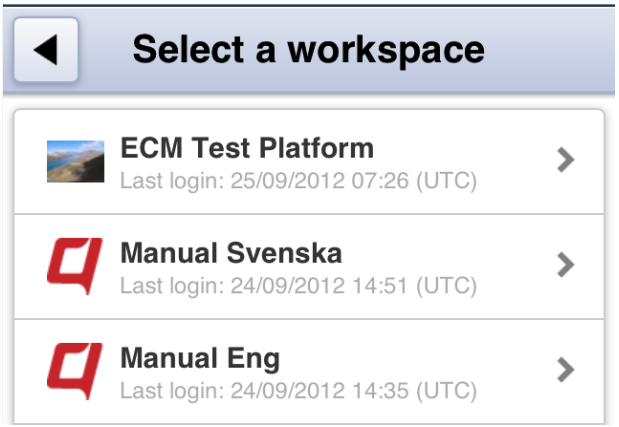
Mobile Interface

It is possible to login to a specified workspace via the mobile interface. The normal login page has the workspace URL/login as the address. The mobile login has the workspace URL/mlogin as the address. It is also possible to login from the URL m.webforum.com.



Mobile login

Once logged on, you will come to a workspace selection page if you have logged on from m.webforum.com, otherwise you will come directly to the module selection. Click on a workspace name top open it.



Workspace selection (logged in from m.webforum.com)

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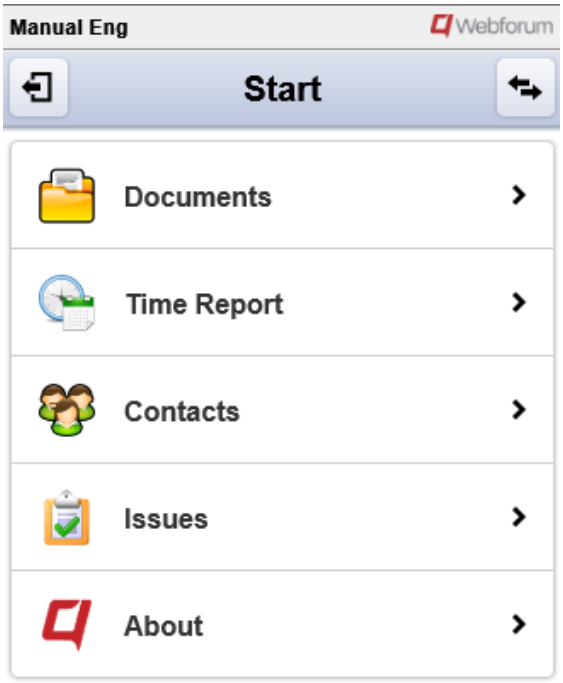
The mobile interface currently has four modules – documents, time report, contacts and issues. Time reporting and Issues are further explained in the Project Management manual.



Module selection

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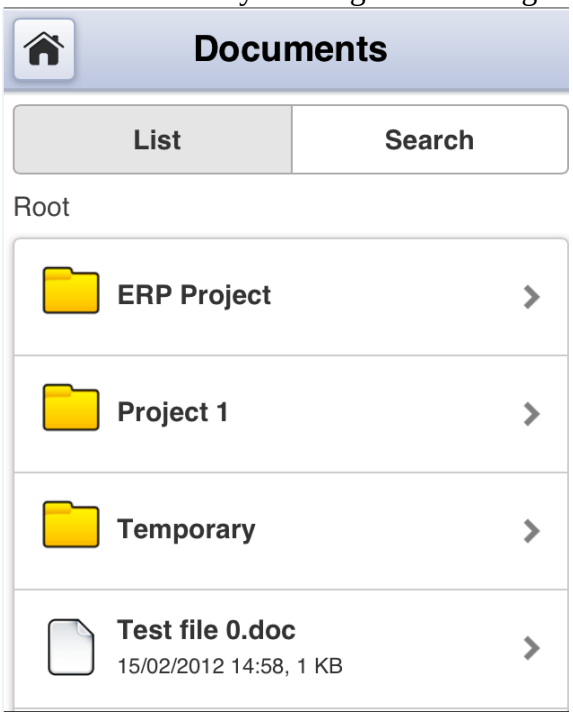
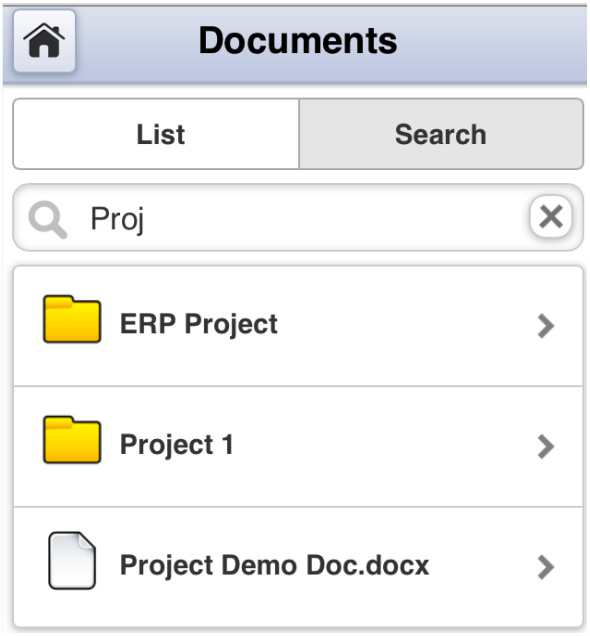
Documents

The documents module can be viewed in list and search mode.
The list mode lets you navigate according to the normal folder structure.



Documents- List

The Search mode lets you search for file and folder names.



Documents- Search

Click on a folder opens the folder. Click on a document gives you detailed information about a document. From that view it is also possible to open the document. Documents can be opened as long as your device supports the display of the file format in question.

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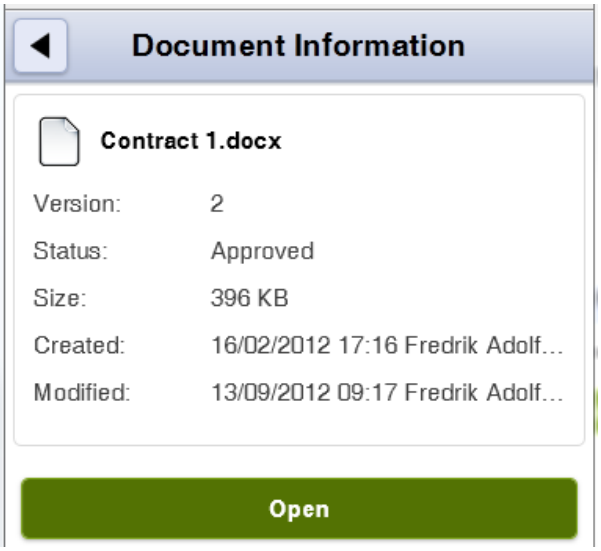

Document Information

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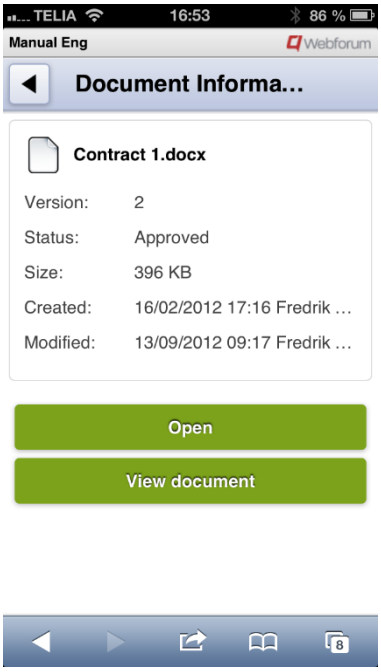
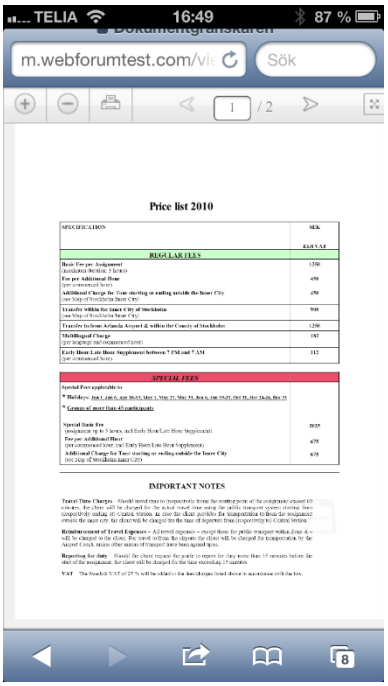
If the Prizm viewer functionality is switched on, you can also use the viewer on mobile devices. This is done by clicking “View document” on the document details page.



View document in the mobile interface

The viewer is opened and has options to zoom and, depending on permissions, to print. It is also possible to change pages.



Mobile viewer interface

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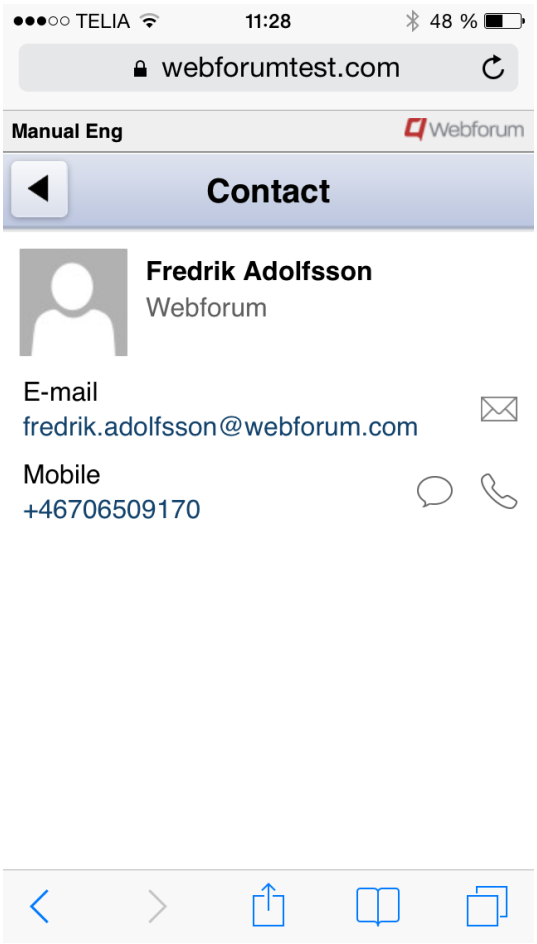
Contacts

Contacts are available in the mobile interface. This makes it easy to e-mail, call or send SMS to the contacts from a smartphone.



Mobile interface for contacts

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Support & Contact Information

Should you have any questions regarding the tools and functionality of the Platform, click "*Help"* in the header to get in contact with the Workspace Operator.

We also recommend that you visit the Webforum homepage at **webforum.com** from time to time. Updates and information about new tools and facilities are posted at this site. There is also a section providing answers to frequently asked questions (FAQ) in the Support-section of the website.

If you do not find an answer to your question in the User Manual or at the Webforum homepage, you are welcome to contact Webforum support from the help section of your Workspace, or by sending an e-mail to **support@webforum.com**.

Webforum Europe AB is continually developing and improving the system. Please feel free to contact your Workspace Operator/Administrator or Webforum Europe AB. Your comments and suggestions are important and appreciated!

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Appendix 1: Installation of the Webforum Plugins for Internet Explorer and Firefox

The use of Drag&Drop and Edit Online requires a plugin to be installed on your computer. The plugin is developed by Webforum and is safe.

There is also an extension for Firefox (Windows and Mac OS) that provides the same drag and drop and edit online functionality as the Internet Explorer plugin. The Firefox installation is started in the same way as for the plugin, but then follows the standard procedure for Firefox extension installations.

Installation procedure

1. Click to open the document archive. If this is the first time you open the document archive and you are using Internet Explorer, you will be asked if you want to install the Webforum plugin, otherwise, see 2 below.

2. In the top right corner you see the text "Install Webforum plugin". It will be in red colour if you do not have the latest version of the Webforum plugin installed. Click on the text and the installation process will start.

3. Press Run when you are asked if you want to run or save the downloaded installation file.

4. Press Next when you see the screen "Welcome to the installation".

5. Close Internet Explorer (if you don't close it now you will be asked to do it later in the installation process)

6. Follow the instructions and the plugin will be installed in a few seconds.

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Appendix 2: Detailed permission settings

Documents

OBJECT	ACTION	FULL	CREATE	READ	UPDATE	DELETE
Recycle Bin[7]	-					
Folder	View properties	F		R		
	Edit properties	F			U	
	View permissions	F				
	Edit permissions	F				
	Add subfolder	F	C			
	Add document	F	C			
	Cut (not root)	F			U	
	Copy (not root)	F		R		
	Paste	F	C			
	Delete (not root)	F				D
	View content	F		R[1]		
	Zip and Download	F		R		
Document[2]	View properties and content	F		R		
	Edit properties	F			U	
	Edit contents online	F			U	
	View permissions	F			U (own[3])	
	Edit permissions	F			U (own[3])	
	Replace	F			U	
	Rename	F			U	
	Cut	F			U	
	Copy	F		R		
	Delete	F			U (own)	D
	Lock	F			U	
	Unlock	F			U (own[4])	
	View old versions	F		R		
	Turn version control on/off	F			U	
	Edit version description	F			U	
	Start review/approval	F			U	
	Participate in review/approval	F		R		
	Update review/approval	F			U (own)	
	View comments	F		R		
	Add comments	F		R		

[1] The user also has to have Read access to the document or folder to see it in the list
[2] In additions to these permissions, there is also a "View" permission. View allows a user to view the document in the viewer, but he/she cannot print or download it.
[3] Users with Update access to the document can see and update permissions on documents they've created themselves
[4] Users with Update access to the document can unlock documents they've locked themselves

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Change comments	F	R (own[5])		
Delete comments	F	R (own[5])	U (all[6])	
Zip and Download	F	R		

Forum

ACTION	FORUM ADMIN ROLE	FULL	CREATE	READ	UPDATE	DELETE
Add forum	FA					
View forum	FA	F		R		
View non-active forum	FA	F				
Edit forum properties	FA	F				
Edit forum permissions	FA	F				
Delete forum	FA	F				
Add thread (*)	FA	F	C			
View thread	FA	F		R		
Edit thread properties	FA	F			U	
Delete thread	FA	F				D
Add posting (reply)	FA	F	C			
View postings	FA	F		R		
Edit posting	FA	F			U	
Delete posting	FA	F			U	D

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Website Administration

OBJECT	ACTION	FULL	CREATE	READ	UPDATE	DELETE
Web page	View in tree	F		R		
	Add subpage	F	C		U	
	Preview (View)	F		R		
	Rename	F			U	
	Move up/move down	F			U	
	Cut[4]	F			U	
	Copy[1]	F		R		
	Paste	F	C		U	
	Delete	F				D[2]
	View content and settings	F			U	
	Edit content and settings	F			U	
	View permissions	F				
	Edit permissions	F				
	Select for start page[3]	F		R		

[6] Users with Update access to the document can delete all comments
[7] Object permissions are not used for the recycle bin. All users can access documents they have placed in the bin themselves. Document archive administrators can access all documents in the bin.

ws in an English start page. So if a user doesn't have R permission to news or calendar page it will not be visible in the start page, settings tab, where you can see news item and calendar events.

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